



Inner Belt Park Access Alternatives Study

Prepared for:
City of Somerville, Massachusetts
Office of Housing and Community Development

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■ Chapter 1



■ Chapter 1

1.0 Study Summary

The City of Somerville hired Vollmer Associates LLP in March of 2003 to prepare a study of potential access improvements to the southern Inner Belt District. Although located in close proximity to Interstate 93 and several major urban arterials, this district suffers from poor vehicular and pedestrian access. This chapter provides a brief summary of the project area, the purpose of this study, the methodology employed, and the study's conclusions and recommendations. Chapters 2.0 through 5.0 of this study expand on the discussion of existing conditions, the development of conceptual alternatives, alternative analysis, and potential funding.

1.1 Project Study Purpose

The purpose of this study was to develop conceptual alternatives that provide improved access to the southern Inner Belt District. These concepts are geared towards access improvements that 1). are not dependent on major development or zoning changes (i.e. wholesale changes to the district) and 2). that minimize impacts to existing rail operations. While some concepts may have broader implications, the City is seeking to address immediate access needs to the Inner Belt District. A select number of concepts were developed in greater detail to review feasibility, costs, and associated impacts.

1.2 Project Study Area

The project study area was defined as the four major surface roadways that bound the Inner Belt District (see Figure 1.2). These include Washington Street, McGrath/O'Brien Highway, Charlestown Avenue/Gilmore Bridge, and Rutherford Avenue. Interstate 93 is an elevated structure that passes to the east of the Inner Belt District, but provides no direct connection.



Figure 1.1 Existing tunnel tubes along Inner Belt Road

Currently, Inner Belt Road provides the only point of public access into the Inner Belt District. Access to the southern half of the district is restricted by the New Hampshire Mainline (Lowell Line) which cuts roughly east to west across the district. Public access beneath this raised railroad embankment is limited to twin tunnel tubes that are substandard in width and height (see Figure 1.1). A private road along the eastern edge of the district also provides a narrow point of access under the Lowell Line to the MBTA Engine Terminal and to the eastern end of Third Avenue.

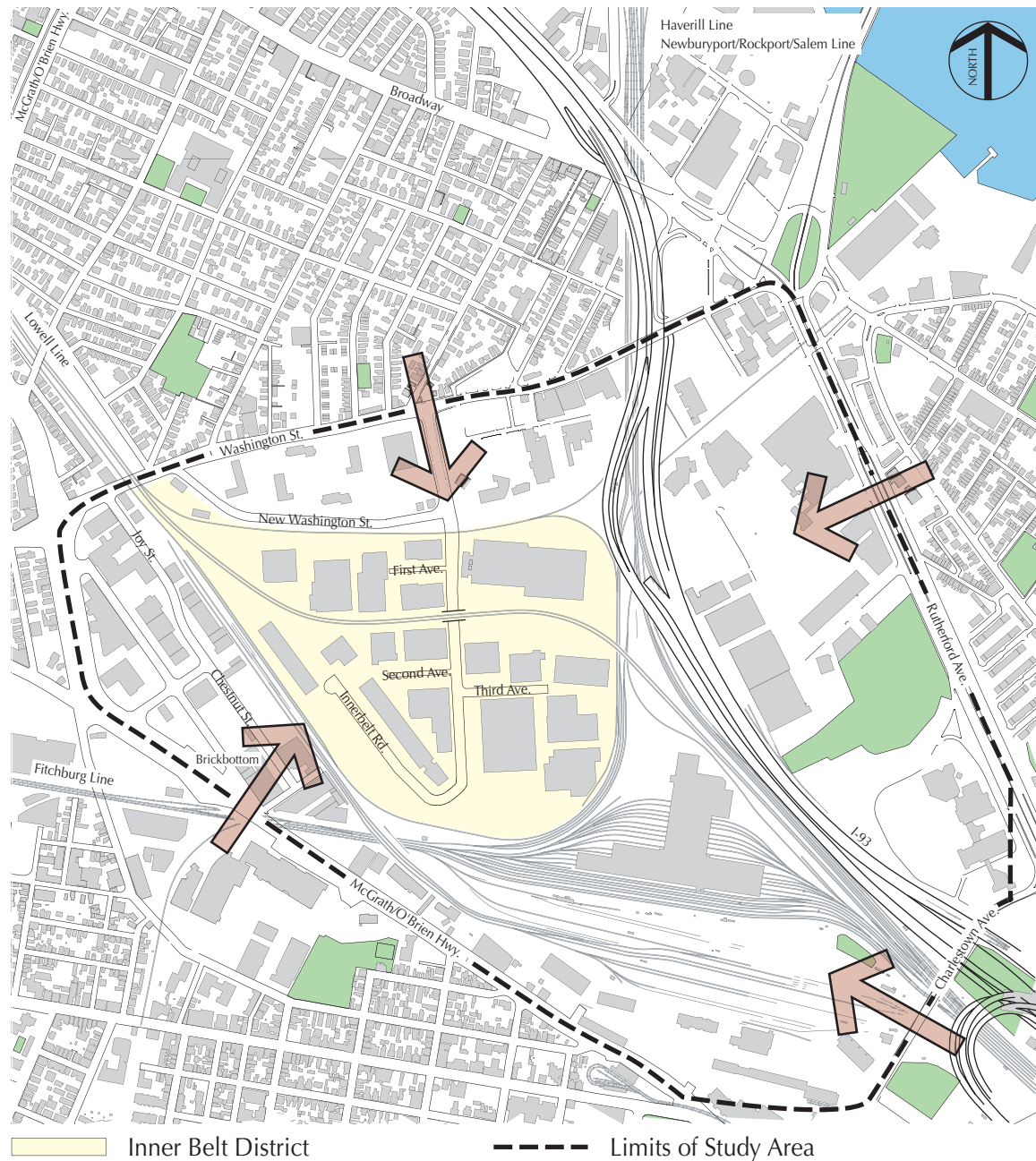


Figure 1.2 Project Study Area

1.3 Project Study Methodology

This study involved a five-step process that included 1). an assessment of existing conditions and review of available reports and data (no new data was collected), 2). development of conceptual alternatives, 3). refinement of six selected alternatives, 4). review of District Improvement Financing (DIF) as a funding mechanism, and 5). the consolidation of steps 1-4 into this report.



The City of Somerville anticipates that future meetings with stakeholders will be required as any of the concepts listed herein are advanced in development.

1.4 Project Study Conclusions / Recommendations

After reviewing the six alternatives presented in Chapter 4.0, the City of Somerville determined that Alternatives IB1, M2, and M4 best serve the immediate needs of the southern Inner Belt District. These needs include greater visibility, improved vehicular access, and enhanced pedestrian circulation & safety. A brief summation of these three alternatives is provided below:

1.4.1 Concept IB1

Concept IB1 would involve the replacement of the twin tunnel tubes located where Inner Belt Road passes beneath the New Hampshire Main line (MBTA Lowell Line). The inadequacy of these "temporary tubes" has been recognized for a number of years. In 1989 Universal Engineering prepared a detailed analysis of the tunnel tubes, the substandard nature and problems with the tubes, as well as potential alternatives. This study recommended a preferred design concept for replacement as well as a suggested construction sequence to minimize impacts to MBTA Commuter Rail operations.

As Inner Belt Road provides the sole means of public access into the southern Inner Belt District, we believe that upgrading this underpass to meet current standards should be given high priority. Concept IB1 recommends implementation of the 1989 concept.

1.4.2 Concept M2

Concept M2 would establish a new point of access from the McGrath/O'Brien Highway into the southern end of the Inner Belt District. This concept would establish both a secondary point of access into the district as well as open up the area to a major urban arterial and the City of Cambridge. The City is optimistic that this will encourage future growth and interest in the Inner Belt District. This concept has been developed to cross over the MBTA Fitchburg line and an existing railroad line (Grand Trunk) which provides a vital north-south rail connection through Boston.

While this connection would improve access into the district, the steep gradient of the proposed road does not make it ideal. Additionally, continued coordination with both the MBTA and Guilford Freight will be required to insure the feasibility of this alternative as various changes to rail operations are being contemplated. At this juncture, it would appear that any green line extension would likely be elevated above this alternative. However, there is discussion of raising the grade of the MBTA Fitchburg line due to flooding problems which would seriously compromise the vertical alignment of this alternative. Finally, this concept would require continued coordination with MassHighway for connecting to the McGrath/O'Brien Highway as well as the proposed Community Path being studied by the City of Somerville.



1.4.3 Concept M4

Concept M4 alternative would link the Inner Belt District with the Brickbottom District by extending two new roadways from Inner Belt Road to Chestnut Street. This would create a secondary means of access from the McGrath/O'Brien Highway and Cambridge into the district. This concept requires the extension of Inner Belt Road and the development of two new underpasses to maintain the existing freight corridor. This rail corridor is lightly used and may allow for simpler methods of construction staging or even temporary track closures.

Further refinement of this concept will require coordination with the MBTA and Guilford Industries to assess impacts and right-of-way issues. However, the true benefits of this alternative may only be realized if and when the McGrath/O'Brien Highway is improved. The suggested removal of this aging elevated highway would greatly improve access and visibility to the eastern edge of the Inner Belt District.

■ Chapter 2



■ Chapter 2

2.0 Introduction

The purpose of this chapter is to offer a brief but succinct assessment of existing conditions for the project study area. This document addresses the following issues: land use, condition and capacity analysis of existing roadways, vehicular traffic, traffic statistics and forecasts, MBTA rail operations, private railroad operations, public and private utilities, roadway design development, community connections, pedestrian connections, urban design, and design objectives.

2.1 Existing Land Use

There are 5 major types of land use present within the study area. These include commercial, residential, industrial, institutional, and office. There are also several facilities that are currently vacant. These are shown in Figure 2.1.

2.2 Roadway Operations and Traffic

2.2.1 Roadway Conditions and Capacity Analysis of Existing Roadways

The internal roadways of the Inner Belt District include Inner Belt Road, First Avenue, Second Avenue and Third Avenue. Inner Belt Road is the primary roadway with the other roadways providing access and parking for the individual parcels. Inner Belt Road is a two lane roadway that varies in width from approximately 36 feet to 40 feet. The existing internal roadway system is in fair condition with spot repairs of potholes required. Inner Belt Road has curbs and gutters with a closed drainage system.

Pedestrian access and accommodation throughout the district is sporadic and in poor condition. Sidewalks are found along Third Avenue but are limited along First Avenue, Second Avenue and Inner Belt Road.

Inner Belt Road currently passes under the MBTA Lowell Line through two "temporary" tubes. These tubes do not meet current state or city codes and will need to be replaced with any proposed access improvements.

A number of traffic operations studies have been conducted in the area. The Central Transportation Planning Staff (CTPS) is undertaking a corridor study for Route 28 in Somerville. Under Tasks 2 and 3 of that study, CTPS has compiled traffic data that includes information taken from the North Point Development Environmental Impact Reports (EIR), Star Market Expansion and Internet Center. Each individual report contains detailed traffic information. The current CTPS study will summarize findings of existing roadway analysis as they pertain to the Inner Belt study area.

Inner Belt Park Access Alternatives Study

City of Somerville, MA



Figure 2.1 Inner Belt Land Use



The results of the capacity analysis are reported in terms of Level of Service (LOS). The level of service is an evaluation of roadway operations based on a graded scale from A through F, with A representing free flow conditions and F representing failing conditions with heavy congestion. The following table provides the Intersection LOS criteria reported in the CTPS study.

Intersection LOS Criteria		
Average Delay per Vehicle (Seconds)		
LOS	Signalized Intersections	Unsignalized Intersections
A	#10.0	#10.0
B	10.0< and #20.0	10.0< and #15.0
C	20.0< and #35.0	15.0< and #25.0
D	35.0< and #55.0	25.0< and #35.0
E	55.0< and #80.0	35.0< and #50.0
F	80.0<	50.0<

Source: Transportation Research Board, *Highway Capacity Manual*, Special Report 209, Third Edition, National Research Council, Washington D.C. 2000

Figure 2.2 Intersection LOS Criteria

Along Route 28, existing conditions are generally acceptable with LOS ranging from B to D for both the AM and PM peak hours. The exceptions are the intersections of Route 28 at Medford Street, Pearl Street and Broadway with morning peak hour operations reported as LOS F, F and E on each approach, respectively. Route 28 at Charlestown Avenue also operates at LOS F for both the morning and evening peak hours.

Along Rutherford Avenue, failing LOS are reported at Charlestown Avenue for both northbound and southbound directions. All other intersections in the study area show acceptable levels of service.

In addition to the intersections included in the CTPS study, the Star Market Expansion EIR and the Internet Center ENF analyzed the following intersections near the project area:

Star Market Expansion EIR

- McGrath/O'Brien Highway (Route 28) at Twin City Plaza driveway
- McGrath/O'Brien Highway (Route 28) at Somerville Avenue and Medford Street
- Gore Street at Lambert Street and Twin City Plaza driveway
- Gore Street at Rufo Road and Seventh Street
- Gore Street at Sixth Street

Internet Center ENF

- Washington Street, Cambridge Street and Inner Belt Road



- Inner Belt Road and New Washington Street
- Washington Street and New Washington Street

All intersections currently operate at acceptable levels of service (LOS D or better) with the exception of Washington Street, Cambridge Street and Inner Belt Road in the morning peak hour and Route 28 at Somerville Avenue/Medford Street.

2.2.2 Vehicular Traffic, Statistics and Forecasts

The Southern Inner Belt district is located in close proximity to several major regional and local roadways but suffers from poor access. (Refer to Figure 2.3) Interstate 93 abuts the eastern edge of the district. The McGrath/O'Brien Highway (Route 28) and Rutherford Avenue are two major arterials that also surround the district. Washington Street, an east-west collector road that runs between the McGrath/O'Brien Highway and Rutherford Avenue, provides the only major access into the district (via Inner Belt Road), which is currently restricted by the temporary tubes crossing under the railroad.

As part of the Internet Center ENF and the Twin City Plaza Expansion EIR, Vannasse and Associates completed traffic forecasts for the area based on existing traffic volumes that were projected for future conditions using background growth and trips generated by planned developments. These included forecasts of traffic volumes anticipated from the Internet Center site and the Twin City Plaza expansion. These volumes are shown in Figure 2.4. CTPS will be developing traffic forecasts on a regional basis for Route 28 under Task 5 of their ongoing study.

2.3 Railroad Operations

Railroad lines currently surround the entire Inner Belt District with one major crossing via the temporary tubes. Any access alternatives proposed will need to address the issue of crossing active railroads.

Railroad operations can be divided into public and private companies. These include the following:

2.3.1 Public Railroad Operations

Public railroad service is owned by the Massachusetts Bay Transportation Authority (MBTA) and consist of both the MBTA Commuter Railroad and the MBTA subway system. The commuter railroad is currently operated by the Massachusetts Bay Commuter Rail (MBCR).

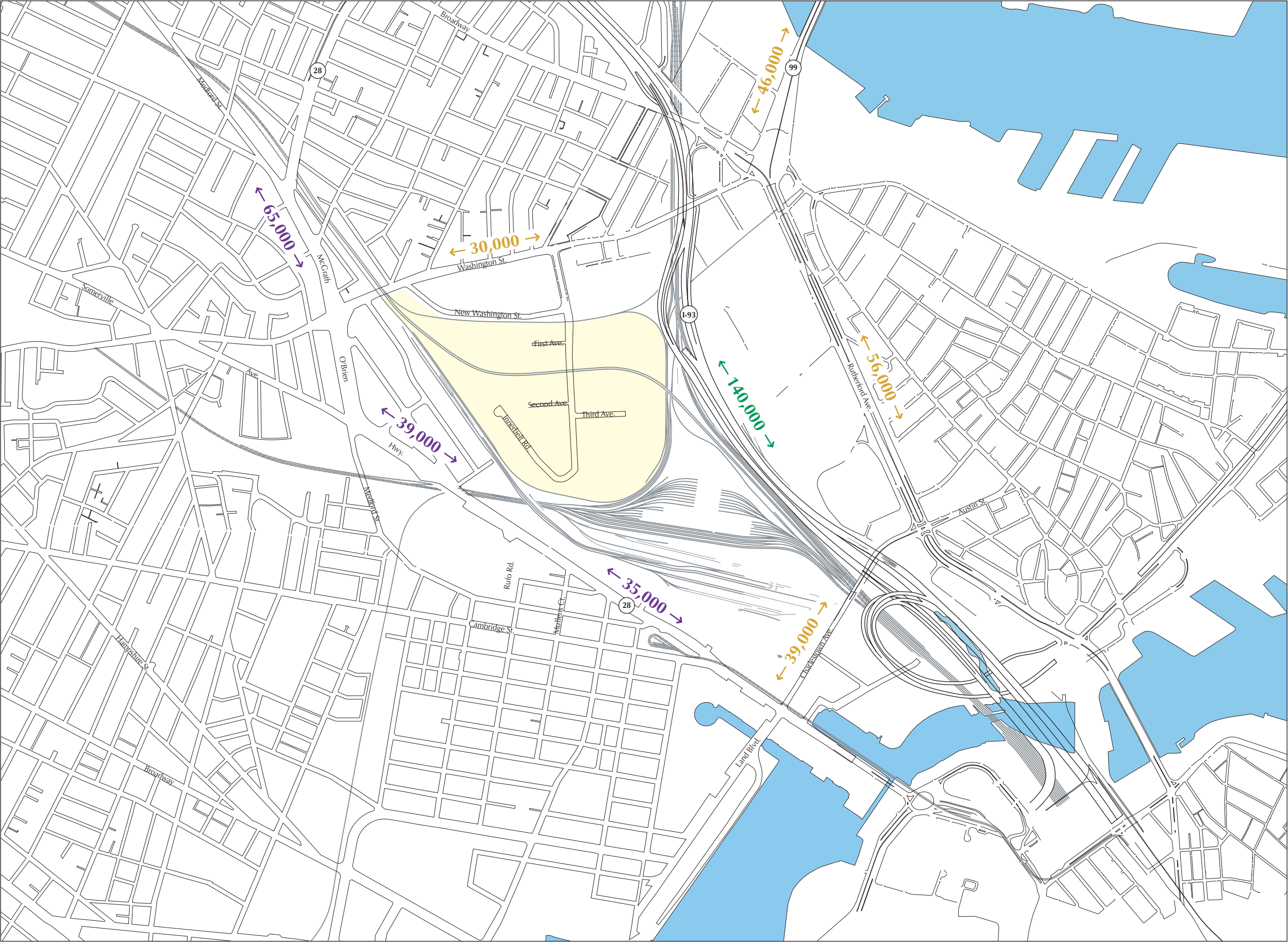
MBTA Commuter Rail

There are four major North Shore commuter rail lines that bound the perimeter of the site. These include the Fitchburg line, the Lowell Line, the Haverhill Line, and the Newburyport-Rockport/Salem Line. These are highlighted in Figure 2.5.

Figure 2.3

Balanced Average
Weekday Daily Traffic
(AWDT)

Data Source: CTPS Draft Route 28 Corridor Study,
March 2004



- Inner Belt District
- Interstate AWDT
- Major Arterial AWDT
- Other Principal Arterial AWDT

Prepared for:
City of Somerville, Massachusetts
Office of Housing and Community Development

Prepared by:



with:
Icon Architecture

Scale: 1" = 1000'



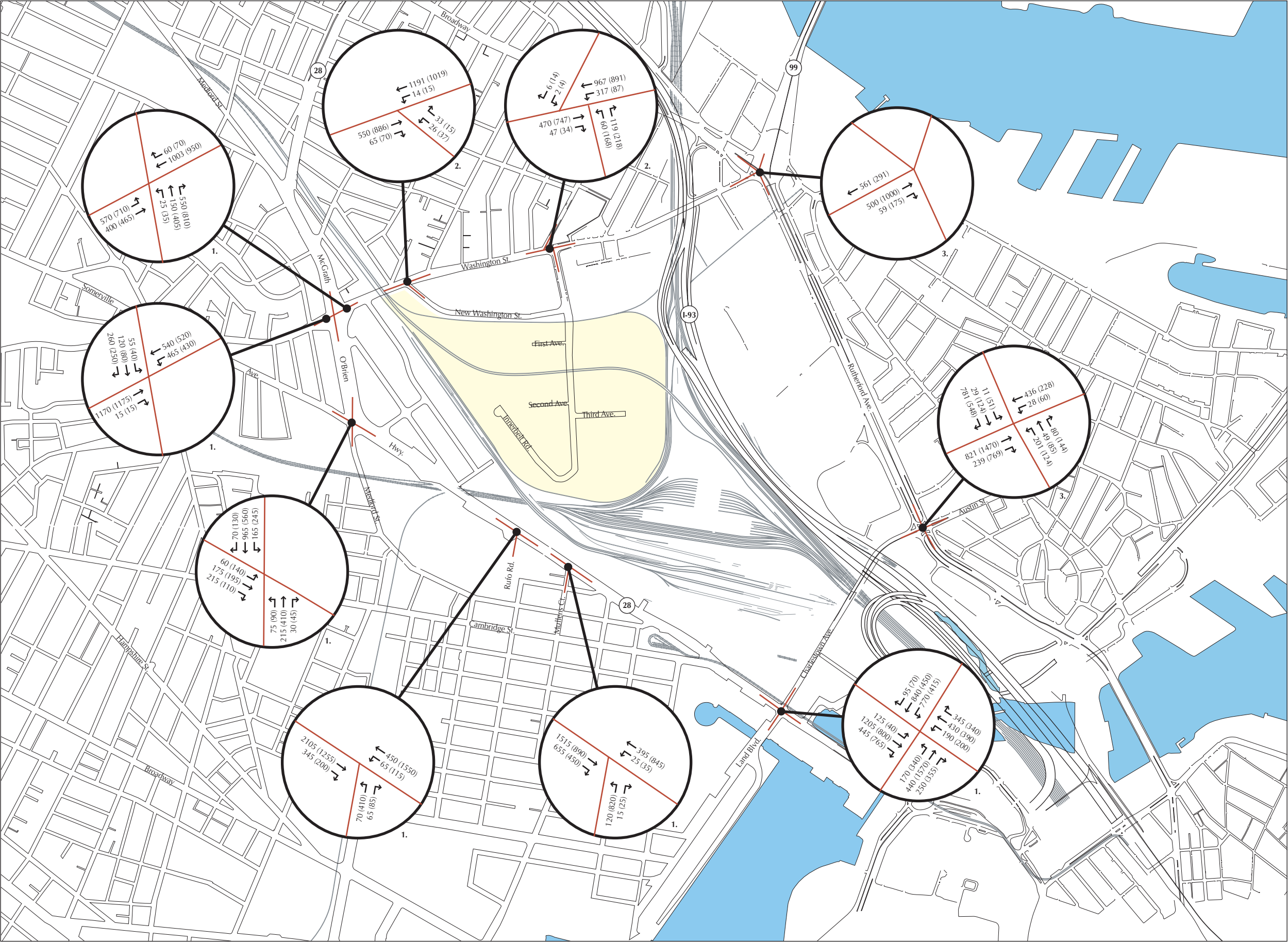
Figure 2.4

2002 Traffic Volumes

All volumes from 2002 except Rutherford Avenue and Sullivan Square (1997).

Data Source: Various traffic reports and studies as follows:

- 1. CTPS Draft Route 28 Corridor Study, March 2004.
- 2. Functional Design Report - Reconstruction of Washington Street by Bayside Engineering, December 2002.
- 3. The Rutherford Avenue Corridor Transportation Study, City of Boston, March 1999.



Inner Belt District
xxx (xxx) AM (PM) Volumes

Prepared for:
City of Somerville, Massachusetts
Office of Housing and Community Development

Prepared by:
VOLLMER ASSOCIATES LLP

with:
Icon Architecture

Scale: 1" = 1000'

500 250 0 1000
scale in feet





MBTA Subway

Two subway lines are located in close proximity to the site. The first is the MBTA Orange Line which runs along with commuter rail lines and bounds the eastern perimeter of the project area. The second is the MBTA Green Line which currently terminates at Lechmere Station in Cambridge. The potential of future extension of the Green Line is currently under study. These are highlighted in Figure 2.5.

2.3.2 Private Railroad Operations

Private railroad operations are owned and operated by the Guilford Railroad Company. Their operations parallel the commuter rail in many locations and include freight lines, sidings and rail yards. These are highlighted in Figure 2.5.

2.4 Roadway Design Development

The area surrounding the Inner Belt District is undergoing extensive transportation planning and design, providing opportunities to take advantage of an improved regional roadway network. Brief descriptions of the ongoing transportation projects are provided below.

2.4.1 McGrath/O'Brien Highway (Route 28) Improvements

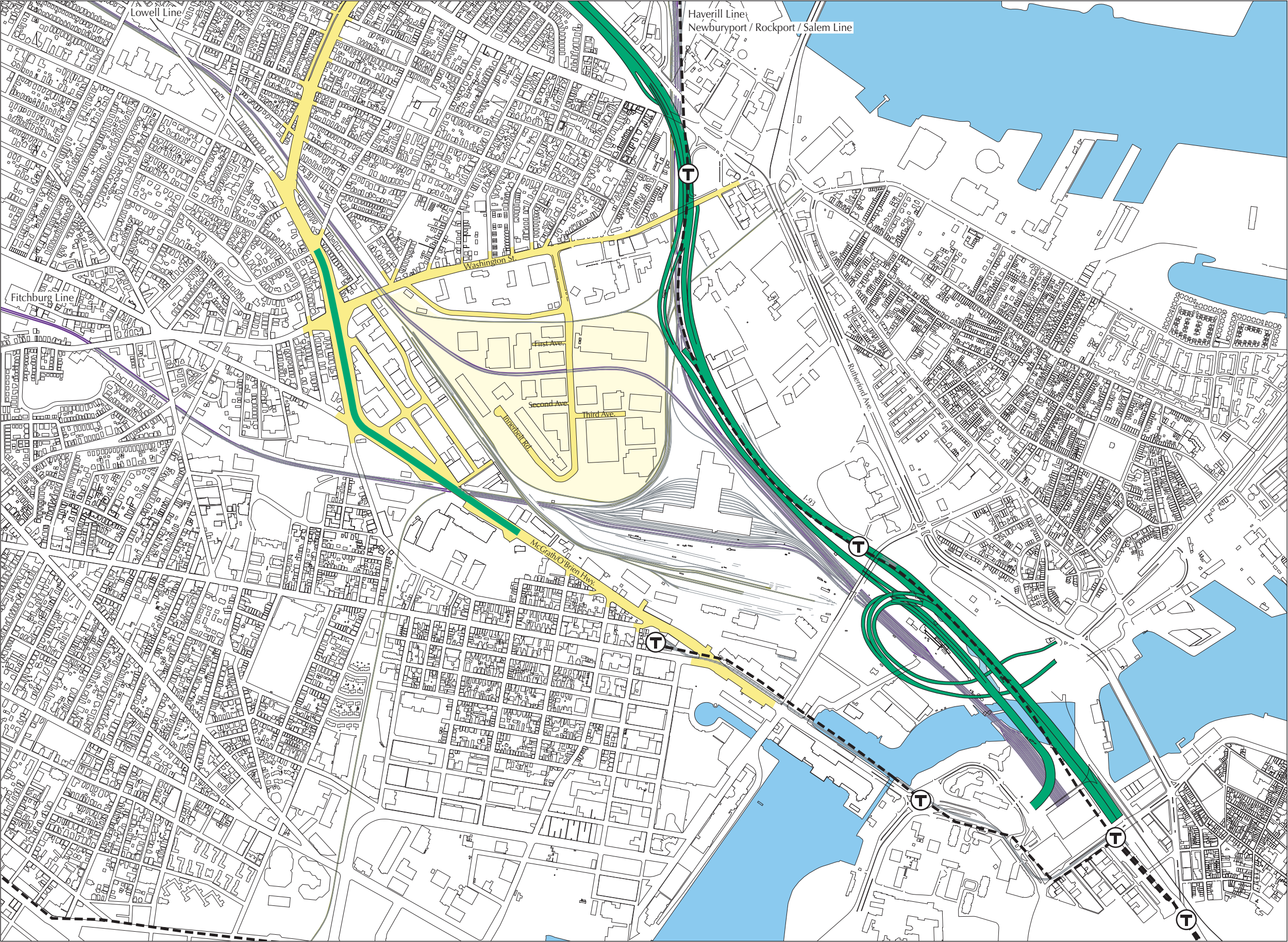
At the request of the City of Somerville, CTPS has formed a Route 28 Corridor Advisory Committee. The goal of the Route 28 Corridor Advisory Committee is to develop a comprehensive transportation management plan for the Route 28 corridor that takes into account recent developments as well as all known planned developments, including the Inner Belt area. The objectives of the study are to:

- Identify and evaluate the collective impact of proposed development on the Route 28 Corridor.
- Develop strategies for addressing the impacts in a comprehensive fashion to decrease congestion and improve safety.
- Develop strategies for increasing the attractiveness of this corridor for pedestrian, bicycle and transit services.
- Identify improvements needed to ensure that responsible development is sustainable in accordance with each affected community's land use plan.

Source: February 20, 2003 Memorandum from Arnold J Soolman to Transportation Planning and Programming Committee of the Boston Metropolitan Planning Organization

There have not yet been any specific transportation related recommendations to come from the study, however any recommendations will accommodate developments in the Inner Belt Area.

Figure 2.5
Existing Road and Rail



- Inner Belt District
- Surface Roads
- Elevated Roads
- Public Commuter Rail
- Private Railroad
- Public Subway
- Subway Station

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City of Somerville, Massachusetts
Office of Housing and Community Development

Prepared by:

VOLLMER ASSOCIATES LLP

with:
Icon Architecture

Scale: 1" = 1000'

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scale in feet





2.4.2 Washington Street Improvements

The Internet Center ENF identified two recommendations for Washington Street to improve site access into the Inner Belt District. The first recommendation was that the signal timing and phasing be revised to provide a westbound leading green phase, in conjunction with a northbound right-turn overlap phase to accommodate westbound left turn traffic. The second recommendation was to relocate the Inner Belt Road/Cambridge Street traffic controller to the mid block pedestrian crossing at Cobble Hill Apartments when the controller is replaced.

The City has also undertaken a 25% design of the Washington Street corridor. The design is undergoing modifications and the final roadway configurations will be taken into account when developing alternatives.

2.4.3 Sullivan Square Improvements

The City of Boston has undertaken The Rutherford Avenue Corridor Transportation Study to "initiate the process of re-structuring this transportation corridor to better achieve both transportation and urban design goals." The goal is to remove regional traffic from city streets. The study contains two plans for the corridor, both of which include the elimination of the Sullivan Square viaduct and rotary.

The existing viaduct at Sullivan Square was removed in 2003 by MassHighway. An interim plan of restoration has been prepared by Edwards & Kelcey, but the final plan of improvements for this area has not yet been developed.

2.4.4 Union Square Improvements

A master plan of the Union Square area has been prepared and will be taken into consideration when developing alternatives.

2.4.5 East Cambridge Planning Study

This study recommends a set of zoning and non-zoning actions, which aim to fulfill the vision for the future of Eastern Cambridge. A suggested plan for implementation follows the various recommendations. This includes North Point and a special district along the McGrath/O'Brien Highway.

2.5 Public and Private Utilities

Currently, public utility service including water and sewer, gas, telephone and electric is provided to all parcels throughout the Inner Belt District. As part of the planned transition to the telecommunications industry for the Inner Belt District, a significant private investment connected the Inner Belt District to the fiber optic loop around Boston and Cambridge. With this connection, the district is well poised to accommodate high-tech industries.



2.6 Urban Design Elements

2.6.1 Pedestrian Connections

Pedestrian facilities within the inner belt or the surrounding perimeter are limited. These consist of sidewalks adjacent to the roadway that vary in completeness and condition.

Washington Street

Washington Street has wide sidewalks on both sides of the street which are frequently used by pedestrians.

Inner Belt Road

There is a continuous sidewalk along the west side of Inner Belt Road the entire length of the road. The east side has a sidewalk from Washington Street to 70 Inner Belt Road. Sidewalks through the two-lane tube bridge are narrow and substandard.

First Avenue

No sidewalks

Second Avenue

No sidewalks

Third Avenue

The north side of Third Avenue has a sidewalk, the south side is in poor condition with cracks, uneven grades, and weeds.

2.6.2 Bicycle Connections

While there are no bike facilities within the Inner Belt park area, a community path along the Lowell line right-of-way is being planned and designed by the City of Somerville. This path is subject to construction feasibility, public process, and the approval of the appropriate railroad companies.

■ Chapter 3



■ Chapter 3

3.0 Development of Concept Alternatives

The concepts are organized based on the geographic locations of the connections presented. The categories include Inner Belt Road, New Washington Street, McGrath/O'Brien Highway, Charlestown Avenue/Gilmore Bridge, Rutherford Avenue and Broadway. The Inner Belt Road and New Washington Street concepts primarily address the issue of improving the existing access to the site as well as internal circulation. These concepts can be considered immediate or short-term solutions to access issues for the existing land uses. The remaining concepts investigate access at a broader scale, including local and regional improvements to provide better connections to the major arterials through Somerville, Cambridge and Boston. These concepts are considered long range solutions to accommodate expected growth in the district. The long-range solutions could be developed in stages that go hand in hand with a phased development of the district.

The primary objective of the concepts is to improve access to the Inner Belt District (IBD). A second, but equally important, objective is to provide better regional connections to make the area more attractive to development, allowing the IBD to realize its full development potential. Currently, there are three major routes from the north into Boston: I-93, Rutherford Avenue and McGrath/O'Brien Highway. As traffic on I-93 queues back through the Somerville exits, vehicles leave the highway and make their way through city streets to one of these two major arterials. In our review of the study area and discussions with city staff, it became apparent that a regional connection from the Assembly Square area through Inner Belt to the college area (MIT, Harvard) would be desirable.

The IBD is essentially landlocked by the surrounding railroad corridor owned by the MBTA and Guilford Railroad. As a result, any proposed concept will have to address railroad crossings or modifications to the railroad alignment. The concepts have been developed to minimize the number of crossings and to make the crossings as realistic as possible. For the purposes of this study, it has been determined by the City that major railroad modifications could be cost prohibitive and shall not be considered for short-term alternatives. In addition, some of the concepts may be constructed in phases, where an interim phase could potentially be constructed relatively quickly and later expanded into the full build concept. These phases could be tied into staged development of the Inner Belt.

3.1 Inner Belt Road

The Inner Belt Road concepts represent short-term solutions that address current access issues. Some form of these short-term improvements will likely be required in conjunction with the longer-range regional solutions.



3.1.1 Concept IB1

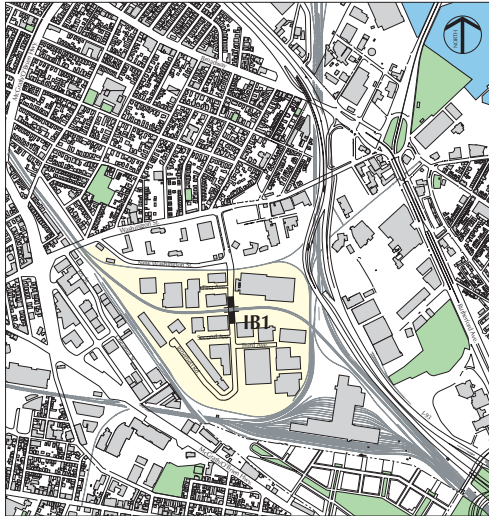


Figure 3.1



Figure 3.2

Concept IB1 would replace the temporary tube tunnels separating Inner Belt Road from the Lowell commuter rail line. This is the only concept that could be classified as essential. The existing tube crossing does not meet current criteria for vertical clearance, sight distance and pedestrian/handicap access. It must be replaced in order to allow any future development. The key issue for this concept will be the construction staging for replacing the tubes while maintaining rail operations. See Figures 3.1-2.

3.1.2 Concept IB2

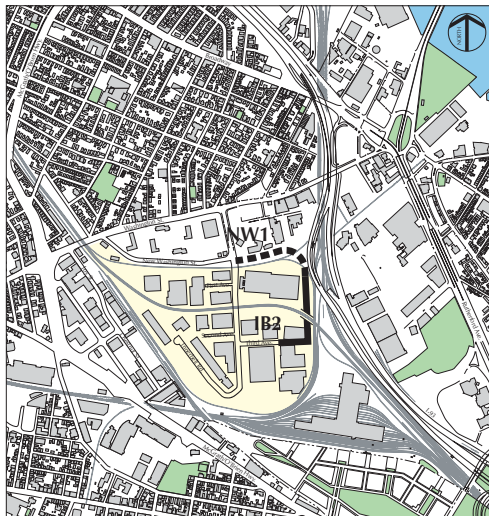


Figure 3.3



Figure 3.4



Concept IB2 would improve the secondary access road that passes below a twin span steel bridge that carries the Lowell commuter rail line overhead. This access is currently a private way, approximately 22 feet wide, and partially owned by Guilford. In addition to the roadway, two freight line tracks cross under the northern span of the bridge. These two freight tracks could potentially be relocated to the south side of the bridge pier, allowing a wider roadway to pass under this bridge. See Figures 3.3-4). Follow-on coordination with Guilford will be required to determine the feasibility of this concept.

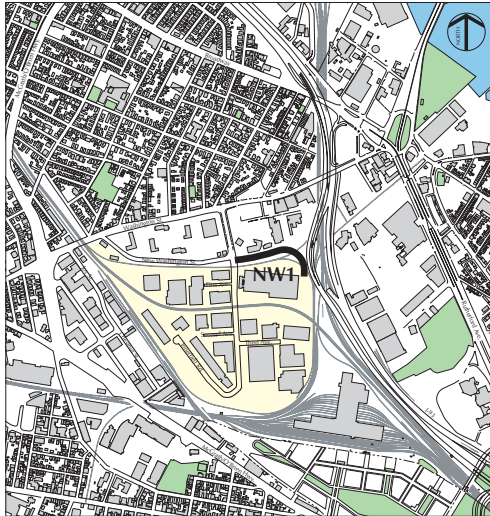


Figure 3.5

The intent of the New Washington Street concepts is to separate industrial/commercial traffic destined for and through the Inner Belt District from the residential area on the northern edge of Washington Street, easing congestion along this busy street.

This concept has the potential of linking to several other schemes including R1 and IB2. Land takings and rail crossings will need to be reviewed further for this scheme.

3.2 New Washington Street

3.2.1 Concept NW1

For concept NW1, New Washington Street would be extended east of Inner Belt Road to link to the secondary access road owned by Guilford. This road would be similar in alignment to an existing private access way, but would be located to the north of the existing railroad tracks in order to better align to the existing inter-

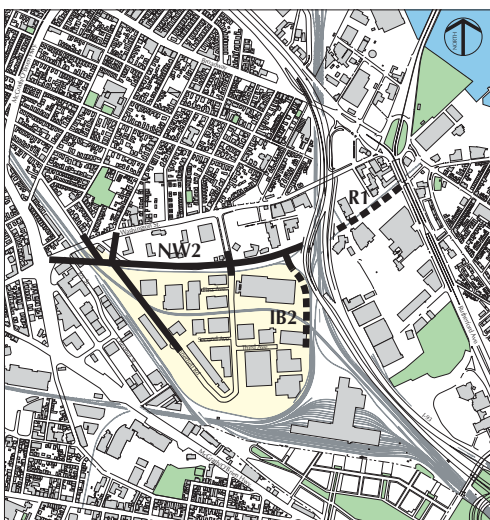


Figure 3.6

3.2.2 Concept NW2

For concept NW2, New Washington Street is conceptually realigned and extended to form a continuous connection from the McGrath / O'Brien Highway to Rutherford Avenue. The short segment described under concept NW1 is extended east from Inner Belt Road to link up with either concept R1 or IB2. On the west side of the district, Inner Belt Road is extended to form a second intersection with New Washington Street, improving circulation around the district. To accomplish the connection, two new overpasses at Washington Street and at the intersection of Cobble Hill Road / Inner Belt Road would be required to cross the Lowell commuter rail line. This concept has the potential of diverting traffic from Washington Street onto New



Washington Street. The key challenge of this concept will be the crossing of the Lowell line.

3.3 McGrath/O'Brien Highway

The remaining concepts investigate long range access improvements involving local and regional connections. These concepts are generally more involved and thus more costly than the prior concepts; however, the benefits could be significant and may present opportunities to develop the concepts in stages consistent with the development phases of the IBD.



Figure 3.7

3.3.1 Concept M1

Concept M1 (See Figure 3.7) would provide a new intersection with the McGrath/O'Brien Highway opposite Sciarappa Street. This new connector road would rise approximately 21 feet over a distance of 700 feet (approximately 4-5% slope). The new connector road would meet the former freight corridor and proceed north by crossing over the Fitchburg Line near the former Red Bridge. Once over the Fitchburg Line, the new connector road would cross a single freight track at grade where it would meet the existing Inner Belt Road.

The main challenges for this concept are the cost of the railroad crossings, railroad coordination and the vertical alignment of the connector road.

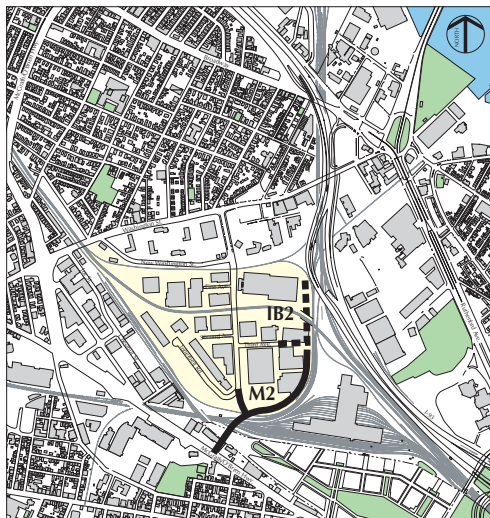


Figure 3.8

3.3.2 Concept M2

For this concept, the intersection with McGrath/O'Brien Highway would be moved north and located opposite Rufo Road. From its intersection with McGrath/O'Brien Highway, the new connector road would begin at elevation 11.3 and rise approximately 29 feet over a distance of 400-500 feet (approximate 9.5% slope). To make grade, this new connection would cut through the abandoned tracks that run into North Point. To pass over the Fitchburg Line, once attaining grade, the new connector would remain on a 250 foot long viaduct section.

After passing over the Fitchburg Line, the new connector road would descend to meet an extension of Inner Belt Road. From this point, the new road could con-



tinue to connect to the Rutherford or Broadway concepts. The main challenges of this concept are the railroad coordination and the vertical alignment of the new connector road. Additionally, this concept would require the taking of two properties for the McGrath/O'Brien Highway connection as well as additional property impacts if the connector road is extended through the district.



Figure 3.9

3.3.3 Concept M3

Concept M3 would move the new connector road / McGrath/O'Brien Highway intersection further north from the previous two concepts, taking advantage of the rising grade on the roadway. A new bridge would be required to cross the Fitchburg Line and the new connector road would cross the freight tracks at grade and descend to existing ground as it approaches the Inner Belt Area. This concept would not require any property takings for the new connector road to the McGrath/O'Brien Highway. The concept could also be developed in conjunction with the Broadway concepts (See Section 3.5) to provide a through connection from Broadway to McGrath/O'Brien Highway. The major issue would be the separation of the road from the existing freight line.

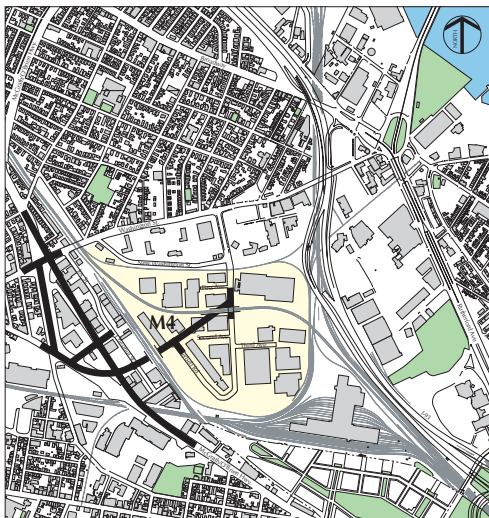


Figure 3.10

3.3.4 Concept M4

Concept M4 would realign McGrath/O'Brien Highway and Somerville Avenue to form a four-way intersection. Somerville Avenue would in effect be extended into the Inner Belt District and could continue through the district in conjunction with the Broadway or Rutherford Avenue concepts (See Sections 3.5 and 3.6), providing a regional connection from the north to the east Cambridge area. McGrath/O'Brien Highway would become more of an urban boulevard and could be brought back down to grade. This new connection would pass beneath the existing freight tracks thereby preserving the existing Guilford freight track as well as future use of the corridor.

Satisfactory traffic operations, especially along the McGrath/O'Brien Highway, would be critical to this concept. Additionally, right of way and railroad coordination would be major issues.

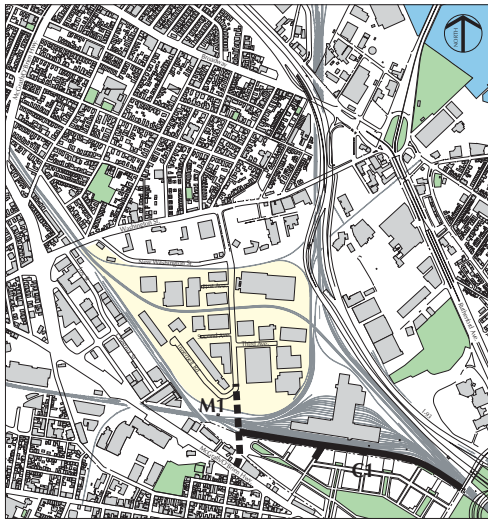


Figure 3.11

3.4 Charlestown Avenue/Gilmore Bridge

3.4.1 Concept C1

Concept C1, or the Boston Rapid Transit (BRT) Link, would provide a connection through North Point using a viaduct that is being considered as part of the BRT. This concept requires significant coordination with the active tracks below and immediately adjoins the proposed North Point Development. Based on limited benefits and perceived conflicts, this concept is not likely to be pursued further.



Figure 3.12

3.5 Broadway/Assembly Square Drive Connection

3.5.1 Concept B1

Concept B1 would provide a new connector roadway adjacent to the rail/I93 corridor to accommodate through traffic and commercial/industrial traffic from Broadway to the IBD, relieving congestion from other city streets. Starting at Broadway, the new roadway would be aligned with Assembly Square Drive. Passing along the I-93 corridor adjacent to the existing freight track, the new connector road would pass beneath Washington Street as it continues towards the IBD. Once in the IBD, this concept could connect to several other options (IB2, NW1, NW2, M4, R1).

Traffic operations would have to be analyzed especially where existing ramps would be replaced by signalized intersections. A major benefit of this scheme is improved access to and from I-93 north and Broadway. Although takings are required, the opportunity to revitalize an area of the community exists. As with almost all of the concepts, close coordination with the railroad owners is required.



Figure 3.13

3.5.2 Concept B2

Concept B2 is identical to B1 except that Broadway would become a two-way road from Sullivan Square. The benefits of this concept are a restored urban boulevard that would provide an opportunity for a gateway from Charlestown into Somerville. The issues with B2 are the same as B1, with the added issue of traffic operations associated with making Broadway a two-way roadway.

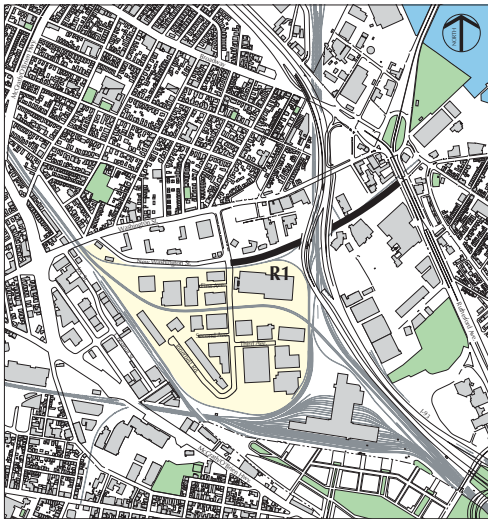


Figure 3.14

3.6 Rutherford Avenue Connection

3.6.1 Concept R1

The final major arterial that has been investigated is Rutherford Avenue. Concept R1 would provide a connector road from Rutherford Avenue under the I-93/rail corridor and into the Inner Belt Area. This connection would result in improved access from I-93 northbound via the off ramp and Sullivan Square. This scheme builds on a concept developed under the City of Boston's Rutherford Avenue study.

3.7 Strategic Planning

The concepts identified in this chapter range from immediate, short term solutions that address access issues associated with existing land uses to long range, regional solutions that would attract future development to the district. The transportation planning should be developed in stages that work in conjunction with a phased approach to developing the IBD. In other words, the City could identify increases in traffic volumes that would be accommodated by each roadway improvement. This increase in traffic volume would be translated into allowable development.

The Inner Belt Road and New Washington Street concepts are short term concepts that would like-



ly improve the existing conditions, but not necessarily sustain significant additional growth. The McGrath/O'Brien, Broadway and Rutherford concepts would allow for additional growth within the district.

3.8 Conclusions

The final transportation network will be largely dependent on the type of development that is planned for the Inner Belt District. For example, the desired connections will be different if the district continues to serve industrial uses compared to retail or residential uses. Some level of improvement should be made to each of the geographic areas discussed above, with the possible exception being Charlestown Avenue/Gilmore Bridge. The exact level of improvement for each area should be determined by balancing the costs and impacts with the transportation demand, which will be driven by development. A phased approach will likely be the most effective way to sustain development without constructing a system that is excessive. This phasing might include constructing the permanent rail crossings and connecting them to either existing roadways or interim roadways. As the area grows, additional regional improvements could be made. The improvements to each area should be developed in conjunction with the other areas to establish a comprehensive transportation network that serves both the Inner Belt District and regional transportation needs, allowing for sustainable development.

■ Chapter 4



■ Chapter 4

4.0 Introduction

The purpose of this chapter is to analyze the six concept alternatives (see Figure 4.1 and plans at the end of this section) that were recommended for further study in the City's memorandum dated May 19, 2004. This chapter expands on Chapter 3, providing more detail and addressing the feasibility of each of the selected alternatives based on constraints and opportunities.

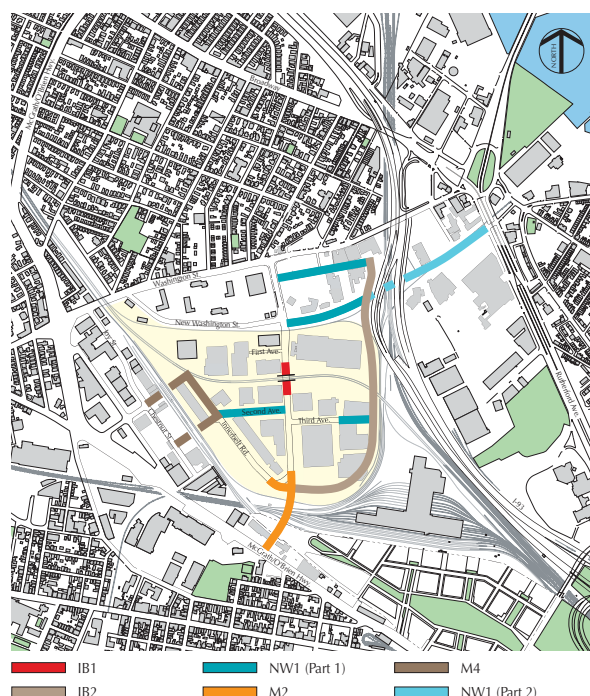


Figure 4.1

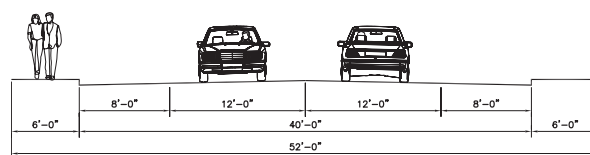


Figure 4.2

several options were presented in Chapter 3 and were categorized based on the adjacent perimeter street to which each option connected. These categories included connections to Inner Belt Road, New Washington Street, McGrath/O'Brien Highway, Charlestown Avenue/Gilmore Bridge, Broadway/Assembly Square Drive, and Rutherford Avenue. From these options, the City selected six concept alternatives for further study, which have been developed in greater detail (these are illustrated in Figure 4.1). The Charlestown Avenue/ Gilmore Bridge and Broadway/Assembly Square Drive connections are not studied further in this chapter.

4.1 Roadway Cross-section

For the purpose of this study a typical roadway cross section of 52 feet was used for all of the concepts (see Figure 4.2). This section includes a 40 foot travel way (curb to curb), with a 12 foot lane and 8 foot shoulder in each direction, and 6 foot sidewalks on each side of the road. This road width is similar to the existing Inner Belt Road, and would accommodate two lanes of traffic with wide shoulders that can be used for on-street parking. Depending on the particular concept or concepts selected, it may be necessary to adjust the final cross-section based on roadway classification (i.e. local vs. collector), traffic demand and abutter impacts.



4.2 Concept IB1 - Inner Belt Road Tube Tunnel Replacement

Concept IB1 is conceived as a local improvement that directly benefits access to the southern Inner Belt district. The immediate need for this improvement is widely recognized, and relatively straightforward. Concept IB1 would replace the temporary tube tunnels that carry Inner Belt Road beneath the Lowell commuter rail line. These existing tubes do not meet current criteria for vertical clearance, sight distance or pedestrian/handicap access. The key issues for this concept are the selection of a preferred design and the construction staging necessary for replacing the tunnel tubes while maintaining MBTA rail operations.

In 1989, Universal Engineering Corporation produced a feasibility study for replacement of the existing tunnel tubes. In this study, they evaluated the relevant elements of the tunnel tube replacement, including existing conditions, traffic analysis, design parameters, methods of construction, alternate designs, and the associated impacts and costs. The conclusion of this study was that a double span structure with a single pier offered the best roadway alignment, vertical clearance, and method of construction (see Appendix A). The design and approval process was estimated to be one year with construction to last approximately 8 months.

As a component of the 1989 study, Universal Engineering also recommended the need for a temporary by-pass around the tunnel tubes for the diversion of traffic entering/exiting the Inner Belt District. The proposed by-pass would use the access drive alongside the former Sweetheart Plastics property that links to Third Avenue. In lieu of a temporary means of access, this route could be improved to provide permanent access improvements to both Third Avenue and the MBTA Boston Engine Terminal (BET). This improvement is represented in this report as Concept IB2.

Vollmer Associates has reviewed this concept and found the general approach and staging to be reasonable. Active coordination with the MBTA and effected businesses within the district will be required as part of final design.

This alternative was estimated to cost approximately \$3.5 million (in 1988 prices). Escalating the price to 2004 prices, this concept would cost approximately \$4.5 million.

4.3 Concept IB2 - Private Road Improvements

Concept IB2 would improve the secondary access road that passes below a twin span steel bridge that carries the Lowell commuter rail line overhead. This access is currently a private way, approximately 22 feet wide, and partially owned by the Guilford Transportation Industries, Inc. (Guilford). In addition to the roadway, two freight line tracks cross under the northern span of the bridge. As a component of this concept, these two freight tracks would need to be relocated to the south side of the bridge pier, allowing a wider roadway to pass under this bridge (see Figure 4.3). In concept, this appears feasible since there is adequate room under the south span to accommodate the relocated tracks.



Concept IB2 would provide an alternate route from New Washington Street through the Inner Belt District to Third Street and the BET. This concept could be constructed prior to the replacement of the twin tubes discussed in Concept IB1, or in conjunction with Concepts NW1 and M4 (see Sections 4.4 and 4.7 for a description of these concepts). Combining Concept IB2 with Concept M2 would provide a direct connection from New Washington Street to the McGrath/O'Brien Highway.



Figure 4.3 Concept IB2 - Existing road would be widened from 22' to 40' by relocating (2) existing freight tracks under North Bridge span.

Traveling south past Third Street, the roadway concept is shown passing around the M.S. Walker Building. At this point, the roadway conflicts with two existing freight tracks and a freight siding that serves the Walker Building. The major constraint of this extension is that these two freight lines and the siding will need to be removed (or the building taken) to make this extension viable. The benefit of this extension is a direct tie back to Inner Belt Road as well as external connections via concepts M2 and/or M4.

The roadway profile for Concept IB2 would essentially follow the existing grade and no new structures would be required. The order of magnitude cost estimate for this concept would be \$2.3 million (takings not included).

4.4 Concept NW1 (Part 1) - New Washington Street Extension & East/West Improvements

Concept NW1 (Part 1) proposes to extend North Washington Street from the existing intersection of New Washington Street / Inner Belt Road east to the edge of the I-93 corridor. The alignment of this extension would roughly parallel the existing freight track and the service driveway alongside the former Sweetheart Plastics property. In all likelihood, the improvement of this section of road would be done in conjunction with Concept IB2 in order to provide improved access at least as far as Third Street. The major constraint for this concept is that the extension is predominantly on railroad property and impacts an existing freight track.

At the City's request, this concept has also been developed to include proposed improvements to three other internal streets. These streets included Roland Street, Second Street, and Third Street. These three streets are underdeveloped and do not meet current city design standards for travel way width, curbing, sidewalks, and lighting. Additionally, all three streets dead end, thereby making navigation, access and egress difficult.

Roland Street

Roland Street is a narrow, dead-ended public street that is located in Boston. Under this concept, Roland Street would be extended to connect to Inner Belt Road. This new connection would require



a right-of-way acquisition across two private parcels. If this concept were completed in conjunction with Concept IB2, the combination of improvements would enhance access and egress to this narrow street. The width of the proposed street would match the existing 28' curb to curb (two 12' lanes and 2' shoulders).

Second Avenue

Second Avenue is currently not a public right-of-way and would require a land purchase to improve. Under this concept, Second Avenue would be extended and improved to connect to the existing end of Inner Belt Road. In conjunction with Concept M4, a new intersection at Inner Belt Road would provide a connection to Chestnut Street and the Brickbottom area.

Third Avenue

Third Avenue is a short public street with a 40 foot right-of-way. This concept proposes to extend and improve the street to the east to form a four-way intersection with Concept IB2 and the existing access drive to the Boston Engine Terminal. This will require purchasing additional right-of-way from private parcels.

With the exception of IB2, these four streets would be surface roads and therefore would not require any significant structures. The roadway profile for IB2 between Roland Street and Third Street is dependent on Concept NW1 Part 2. If only Concept IB2 and/or Concept NW1-Part 1 is developed, the profile would generally follow the existing topography. If Concept-NW1 Part 2 is to be implemented, the entire intersection would have to be depressed as discussed under concept NW1-Part 2 (see below).

The order of magnitude cost estimate is \$1.8 million. This cost estimate is based on the surface level roadways only and does not include any railroad costs. Costs associated with depressing the roadways are included under Concept NW1-Part 2.

4.5 Concept NW1 (Part 2) - New Washington Street Extension to Charlestown

Under Part 2 of Concept NW1, New Washington Street would be extended east to connect to Rutherford Avenue. This concept would develop an external link, providing access from Charlestown to the Inner Belt District. The benefits of this concept include improved regional access through Sullivan Square, with connections to I-93 and to points across the Mystic River.

The major constraint for this concept is that it must be accomplished by crossing beneath the I-93/Orange Line/ MBTA Commuter Rail/Freight corridor.

The target area for crossing the I-93 corridor is shown in Figures 4.4 and 4.5. At this location, I-93, the Storrow Drive ramps, and the MBTA Orange Line are all elevated high enough to cross over several active railroad lines. These rail lines include the MBTA Haverhill, Rockport/Salem and Newburyport lines, as well as freight tracks owned by Guilford that are used frequently by the Boston Sand and Gravel Company.



The location of this crossing would need to be positioned in an area between the supporting columns of the I-93 mainline/Storrow Drive Ramps, and MBTA Orange Line. The City has stated their desire to grade separate the roadway from the railroad tracks, both for safety and function. As a result, the roadway would be constructed as a depressed section under the commuter rail tracks and the freight line, with the I-93 corridor and orange line above. Excavations would need to account for foundations, utilities, and rail operations. A roadway profile is attached illustrating the location and extent of the major facilities.



Figures 4.4-5. Photographs showing location where Concept NW1 (Part 2) would cross under I-93 corridor.

The feasibility of developing this depressed roadway must include the costs of excavation, and a drainage pump station to remove stormwater from the low point of the road. This would be similar in function to the pump station located where the McGrath/O'Brien Highway crosses under Mystic Avenue. Any roadways that tie directly into the depressed roadway concept (such as IB2) would also need to be depressed where they intersect.

As an alternative, the safety and traffic impacts of an at-grade concept were considered against the cost of building a depressed roadway. While an at-grade concept would eliminate the need for excavation and pumping, the frequency of rail traffic in this area would make an at-grade crossing inefficient.

The order of magnitude cost estimate for the depressed roadway concept is \$5.0 to \$7.4 million depending on special construction related to ground water levels. This estimate includes depressing the intersection with Concept NW1.

4.6 Concept M2 - McGrath/O'Brien Highway Connection

Concept M2 creates a new intersection with the McGrath/O'Brien Highway located opposite the shopping plaza entrance at Rufo Road. This concept would require at a minimum, the acquisition of a property (car wash) on McGrath/O'Brien Highway, access rights over railroad lines, and private property acquisition within the Inner Belt District. In order to achieve vertical separation over the



MBTA Fitchburg line, this new road must rapidly ascend, cutting through the existing railroad embankment. A roadway profile is attached to illustrate this condition.

The roadway would include a 230-foot long overpass across the Fitchburg commuter rail line with retaining walls leading to the abutment on either side. After passing over the Fitchburg Line, the new roadway would descend to meet the existing Inner Belt Road. The existing sharp curve at the southern extremity of Inner Belt Road would be replaced by a three-way intersection. Retaining walls would be required to minimize impacts to adjacent properties. The intersection could also be connected to Concept IB2, forming a four-way intersection and potentially providing a connection between McGrath/O'Brien Highway and Rutherford Avenue (via Concept NW1 Part 2).

The primary issues of feasibility for this concept are the gradient of the road, and vertical clearance over the active rail lines (MBTA Fitchburg Line and Guilford tracks). As shown on the attached profile, the road is required to climb at a 9.4% grade to clear the tracks. Maximum grades for urban streets are typically in the range of 6-11%, with a desirable maximum of 8%. This maximum profile grade would also vary depending on the length of the grade (i.e. a steeper grade could be considered for short grades less than 500 feet). Likewise, there is a single Guilford freight track that will need to be lowered approximately 5 feet in elevation to obtain vertical clearance under the new overpass. This will require altering the vertical alignment of the track for approximately 2,000 feet to the north of the overpass to maintain a suitable track gradient in the range of 0.5% (this results in a 5-foot deep excavation near the Brickbottom Apartments). Maintenance of this single Guilford freight track is viewed as important to freight operations because it provides a link between the New Hampshire Mainline and the Haverhill corridor.

The order of magnitude construction cost of this concept is \$8.2 million.

4.7 Concept M4 - Connection to Chestnut Street

Concept M4 proposes to construct two new connections (Roads A & B) from Inner Belt Road to Chestnut Street. In conjunction with the development of Road A, the concept proposes to extend Inner Belt Road to the north end of 200 Inner Belt Road. In doing so, this provides additional points of access to the Inner Belt District from McGrath/O'Brien Highway. The feasibility of developing this depressed roadway must include the costs of excavation, and a drainage pump station to remove stormwater from the low point of the road.

This new connection would pass beneath the existing freight tracks thereby preserving the existing corridor for future uses such as the Somerville Community Path or the MBTA Greenline extension. If preservation of the corridor were determined not to be necessary, the removal of the two overpasses would result in a significant cost savings to this concept.

The order of magnitude construction cost of this concept is \$7.5 to \$10.6 million depending on special construction related to ground water levels.



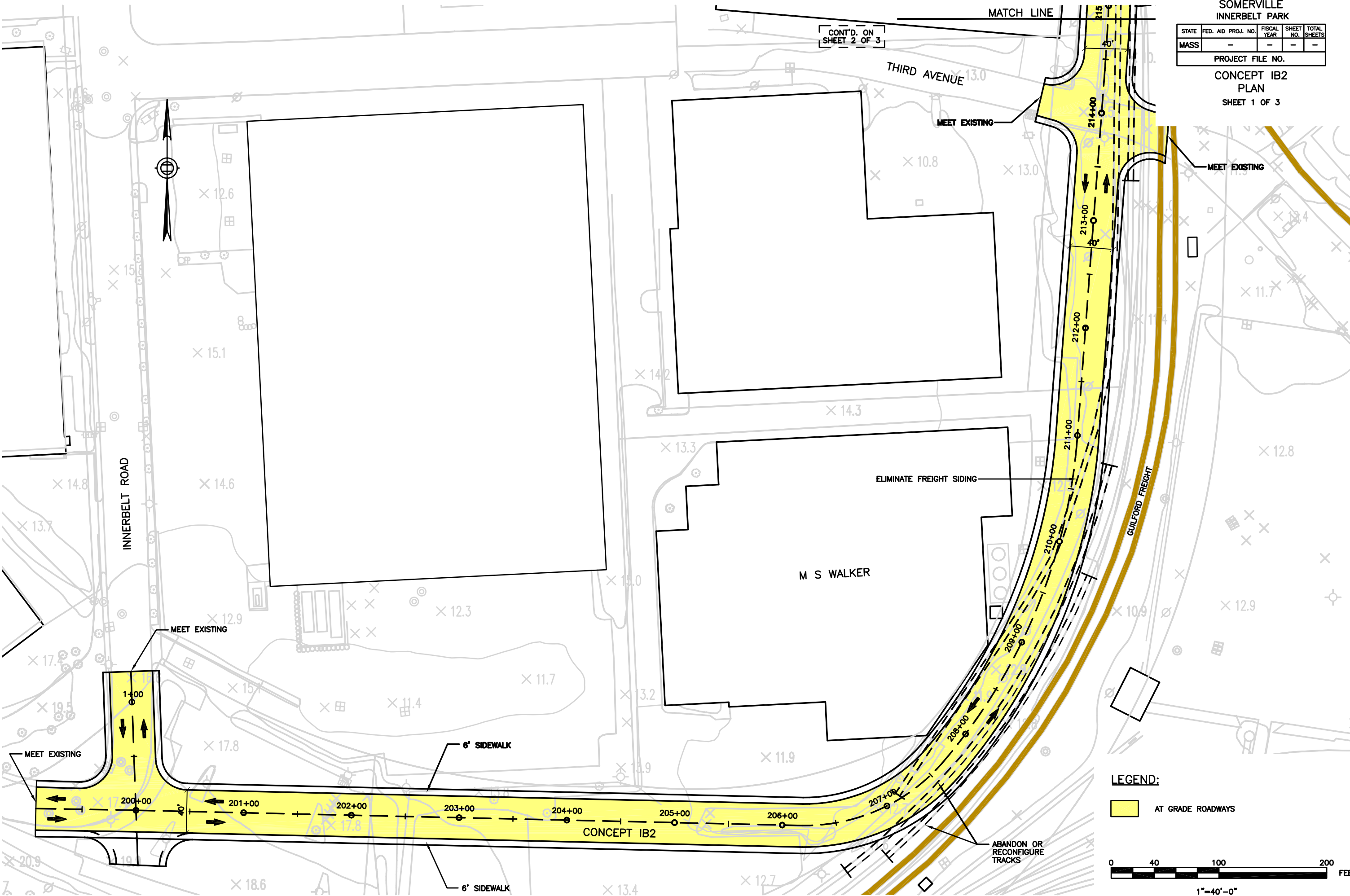
4.8 Concept Comparison Matrix

The concepts identified in this memorandum range from immediate, short-term solutions that address local access issues, to long range regional solutions that would attract future development to the district. The costs and impacts of these improvements generally increase relative to the levels of improvement, therefore the level of transportation improvements should be prioritized and planned based on the overall benefits derived to the Inner Belt District. A matrix is provided in Figure 4.6 comparing various benefits and impacts of the six concepts.

Concept	Design Improvements							
	Infrastructure Improvements	Internal/External Connections	Addresses Safety deficiencies	Access Improvements	Compatible to current development	Parcel Impacts / ROW purchase	Railroad Impacts	Order of Magnitude Costs*
Inner Belt Road								
IB1	Overpass	Internal	Yes	improves district entry	Yes- Previously studied	107-B-1 107-B-1A Boston	Construct Staging	\$4.5 M
IB2	(2) RR grade crossings, multiple RR track relocation / abandon	Internal	Yes	improves locals streets	Numerous RR impacts	MBTA 116-A-3 116-A-5 115-A-2 115-A-3	Grade crossing?, (2) track relocation, (2) track & siding removed	\$2.3 M
New Washington Street								
NW1 - Part 1	Single RR grade crossing	Internal	Yes	improves local streets	Upgrade of existing	MBTA Boston	Grade crossing or Remove Wye track	\$1.8 M
NW1 - Part 2	(2) Overpass, boat section, pump station, abandon RR track	External	new	provides new entry to district	Links to Rutherford Ave study	Boston	Construct Staging	\$5.0 to \$7.4 M
McGrath/O'Brien Highway								
M2	Overpass, RR track lowered	External	new	provides new entry to district	Works with North Point	115-B-8 MBTA 115-A-2 115-A-3 116-A-3	Lower track, realign 2000 LF	\$8.2 M
M4	(2) Overpass, boat section, pump station	External	new	provides new entry to district	coord w/ McGrath Highway rebuild	94-A-8 94-A-9 11-A-10D 112-A-1 112-A-10 MBTA 115-A-3 115-A-1	Construct Staging	\$7.5 to 10.6 M

*Costs do not include land takings, hazardous materials removal, remediation, or engineering design fees.

Figure 4.6



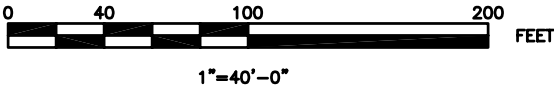
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SHEET 2 OF 3

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PROJECT FILE NO.				

CONCEPT IB2
PLAN
SHEET 1 OF 3

LEGEND:

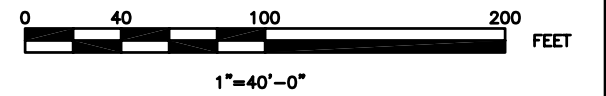
AT GRADE ROADWAYS

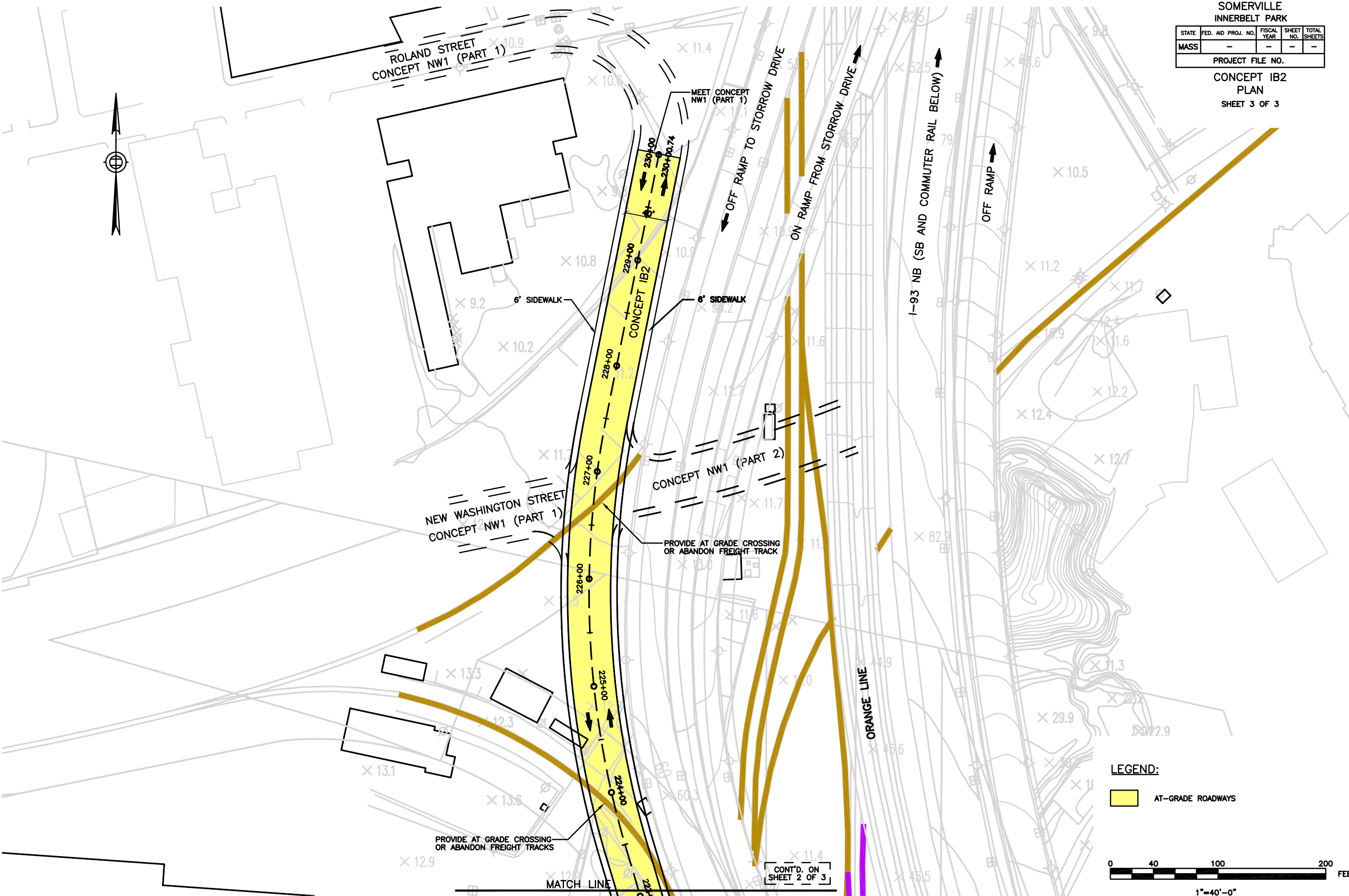


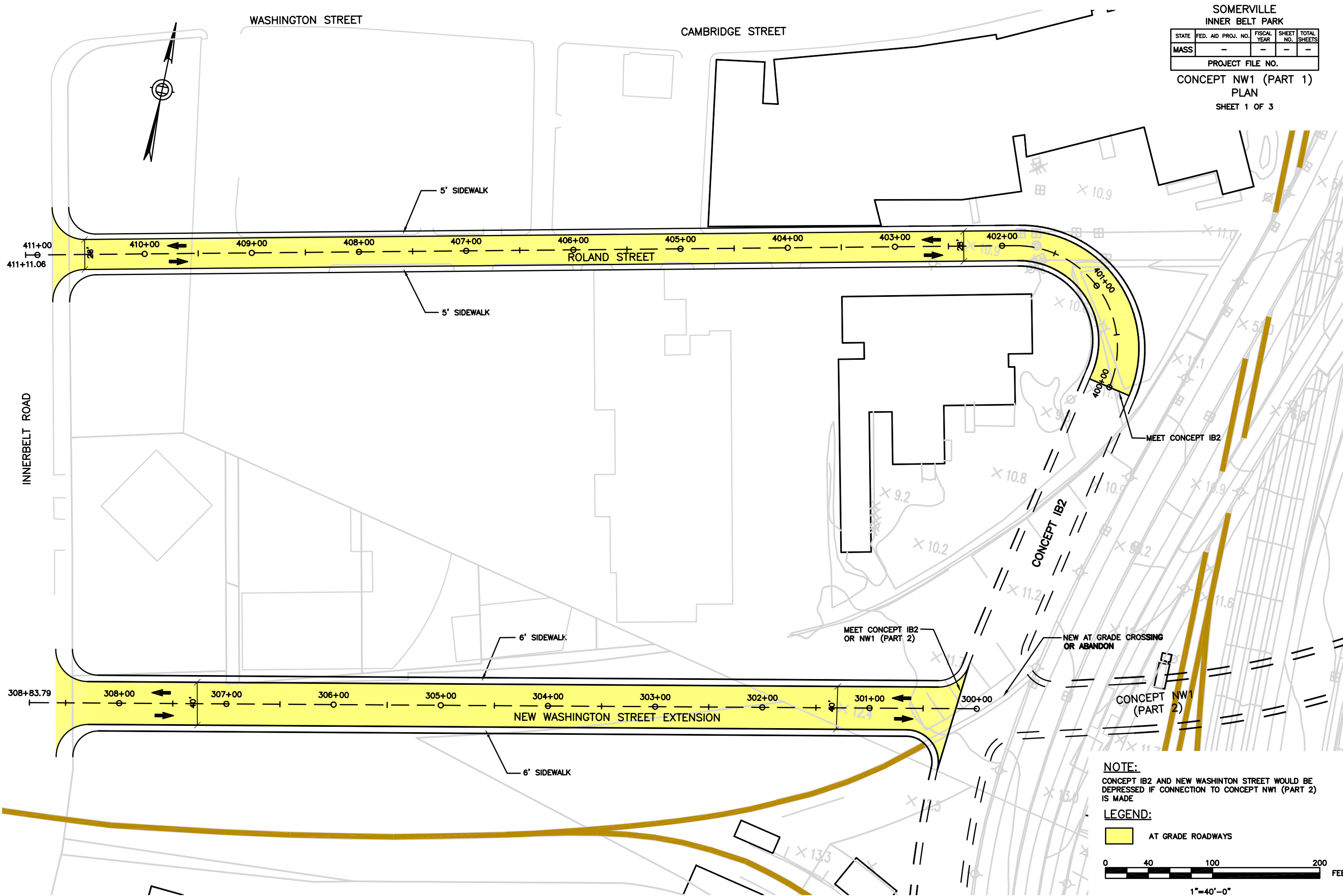
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PROJECT FILE NO.				

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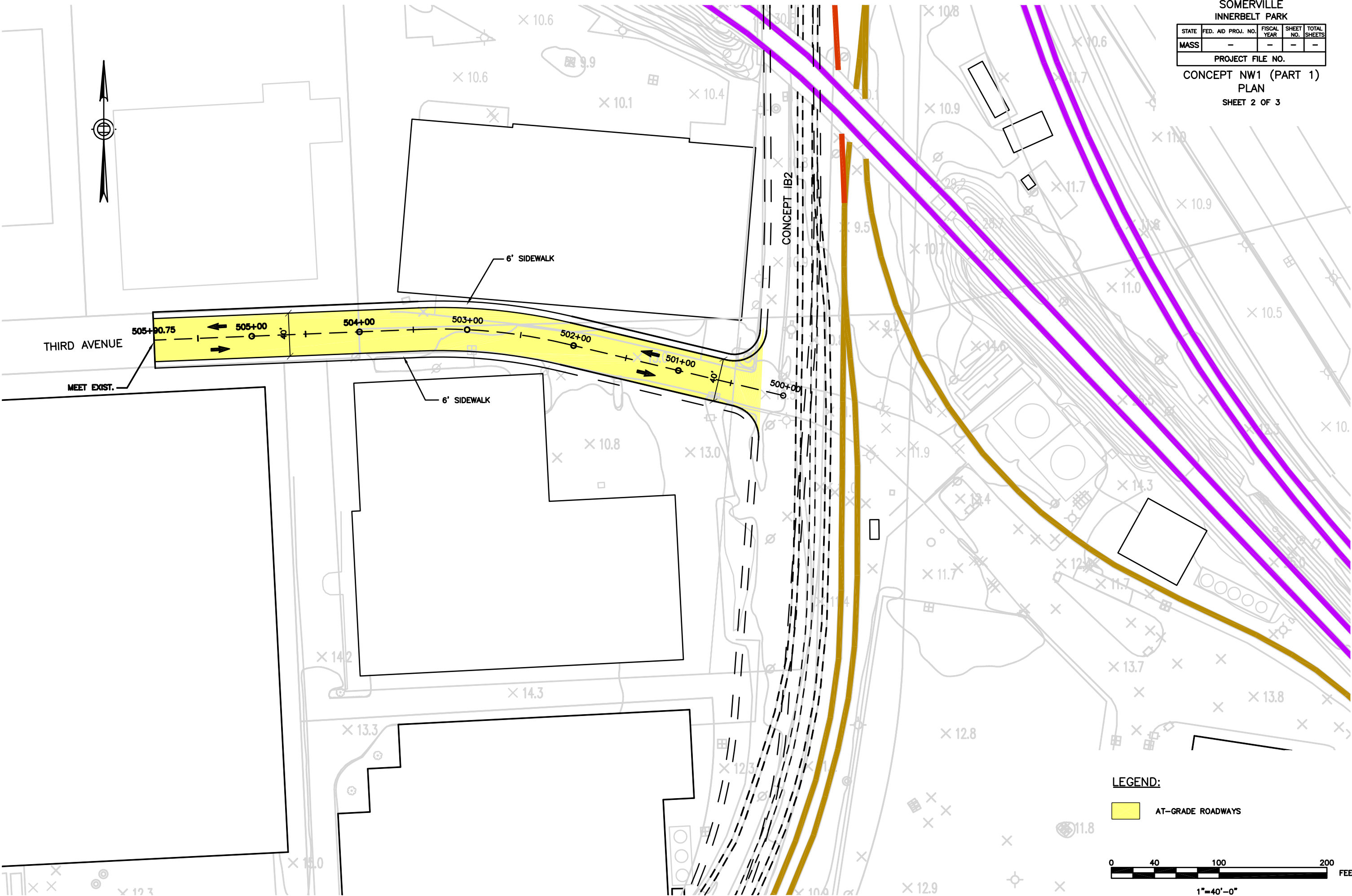
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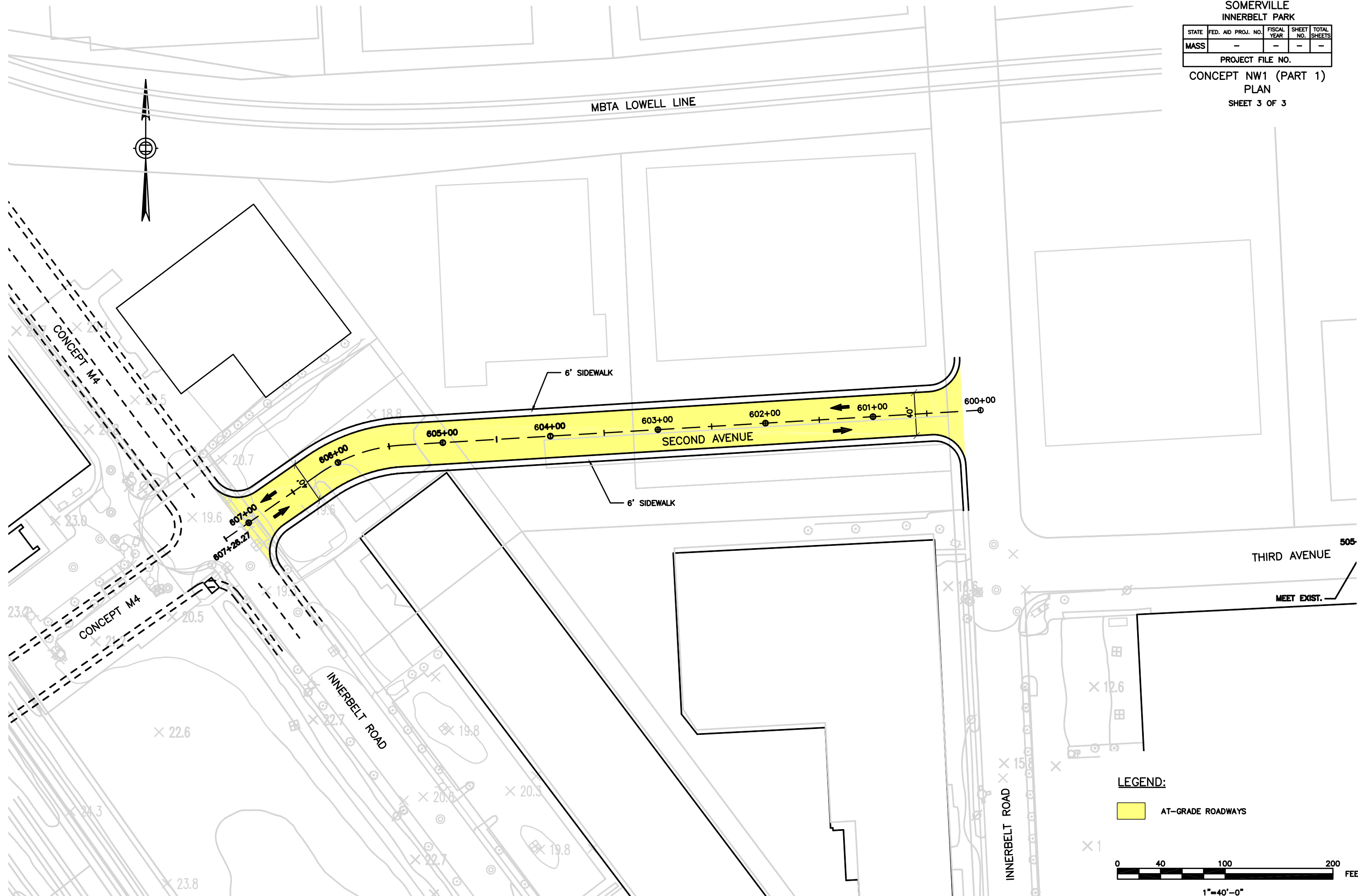
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PROJECT FILE NO.					
CONCEPT NW1 (PART 1)					
PLAN					
SHEET 1 OF 3					

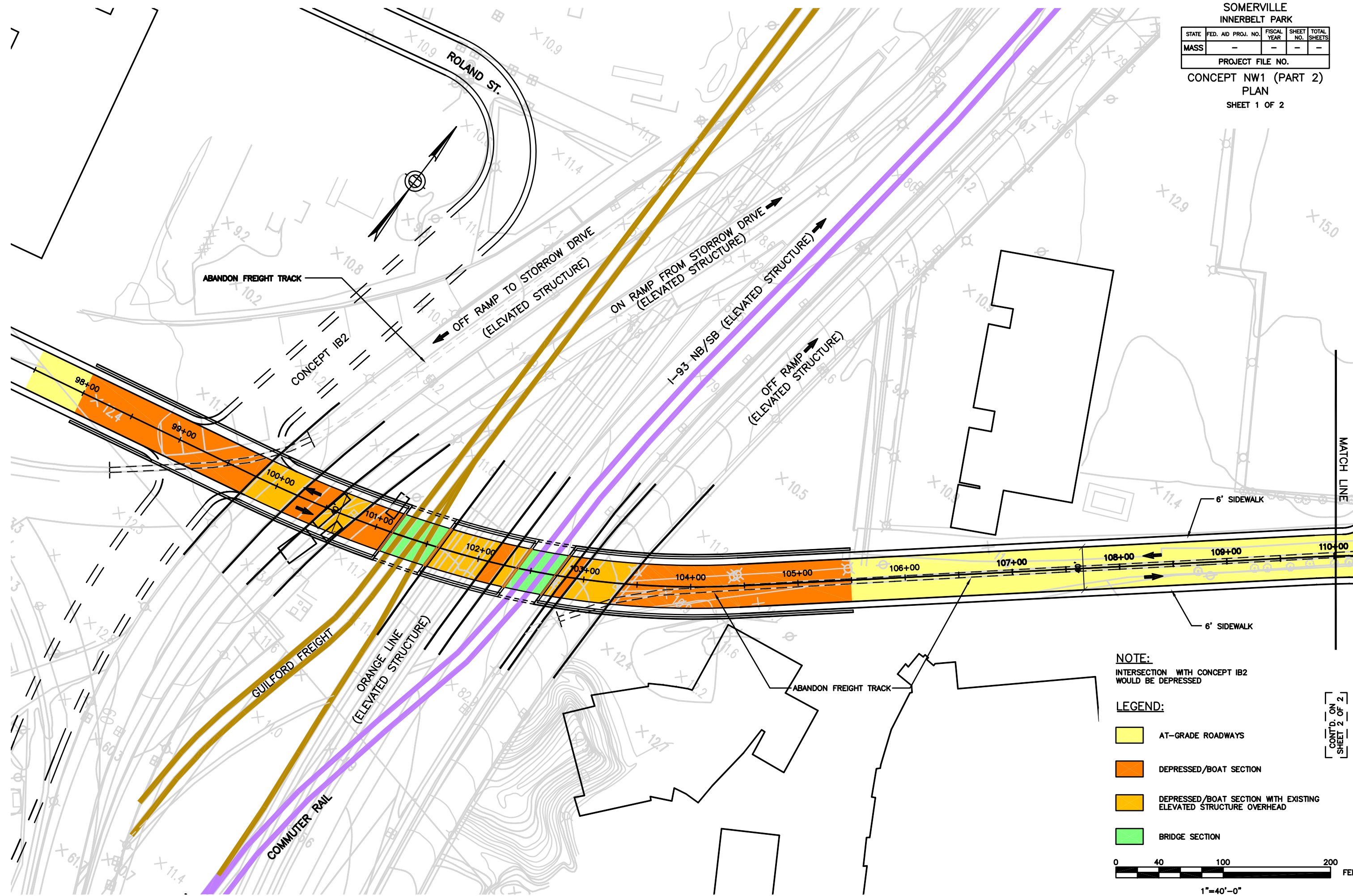


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PROJECT FILE NO.					
CONCEPT NW1 (PART 1)					
PLAN					
SHEET 2 OF 3					

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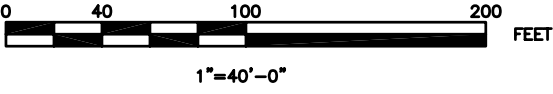
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PLAN
SHEET 3 OF 3



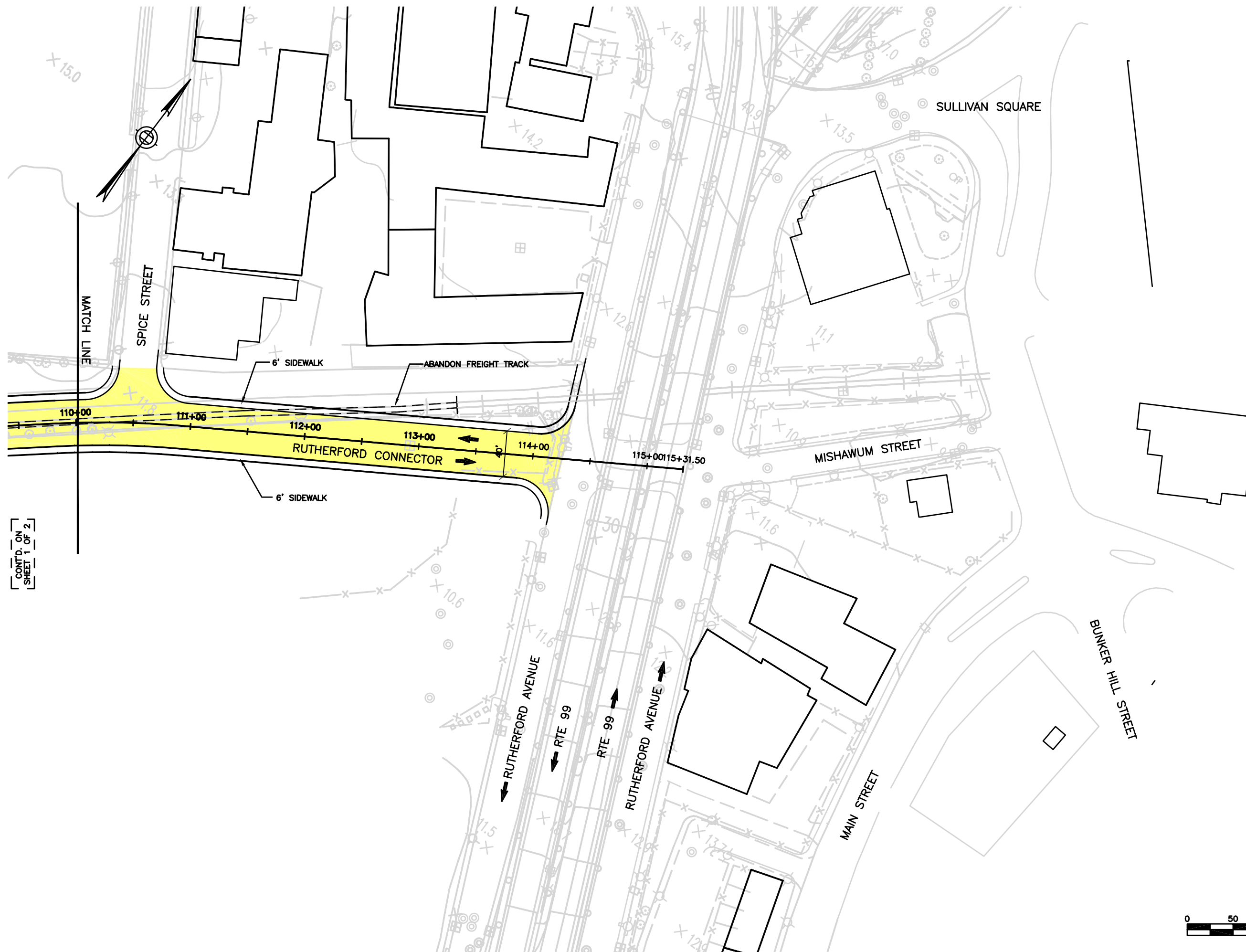


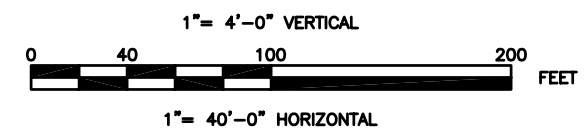
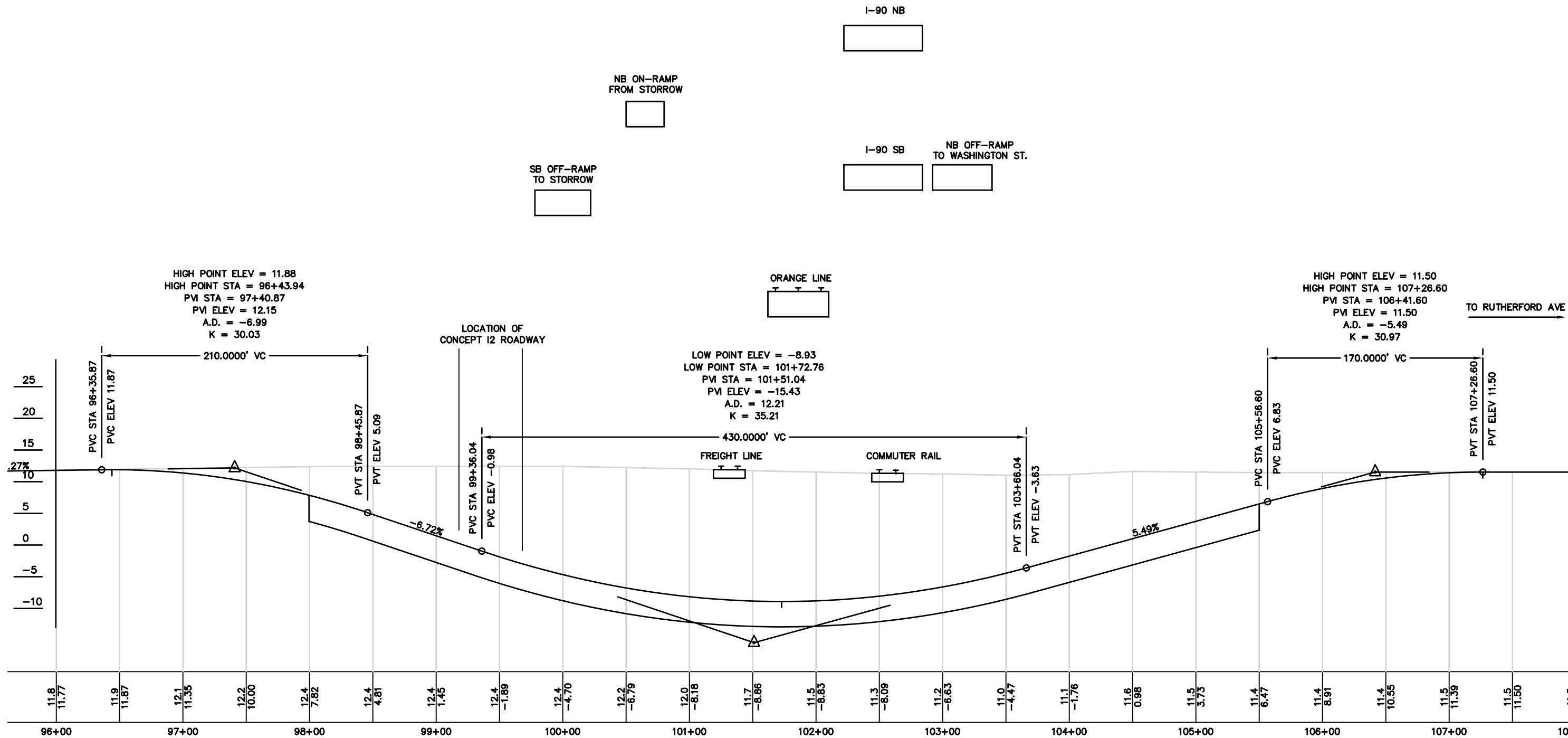
NOTE:
INTERSECTION WITH CONCEPT IB2
WOULD BE DEPRESSED

- LEGEND:
- AT-GRADE ROADWAYS
 - DEPRESSED/BOAT SECTION
 - DEPRESSED/BOAT SECTION WITH EXISTING ELEVATED STRUCTURE OVERHEAD
 - BRIDGE SECTION



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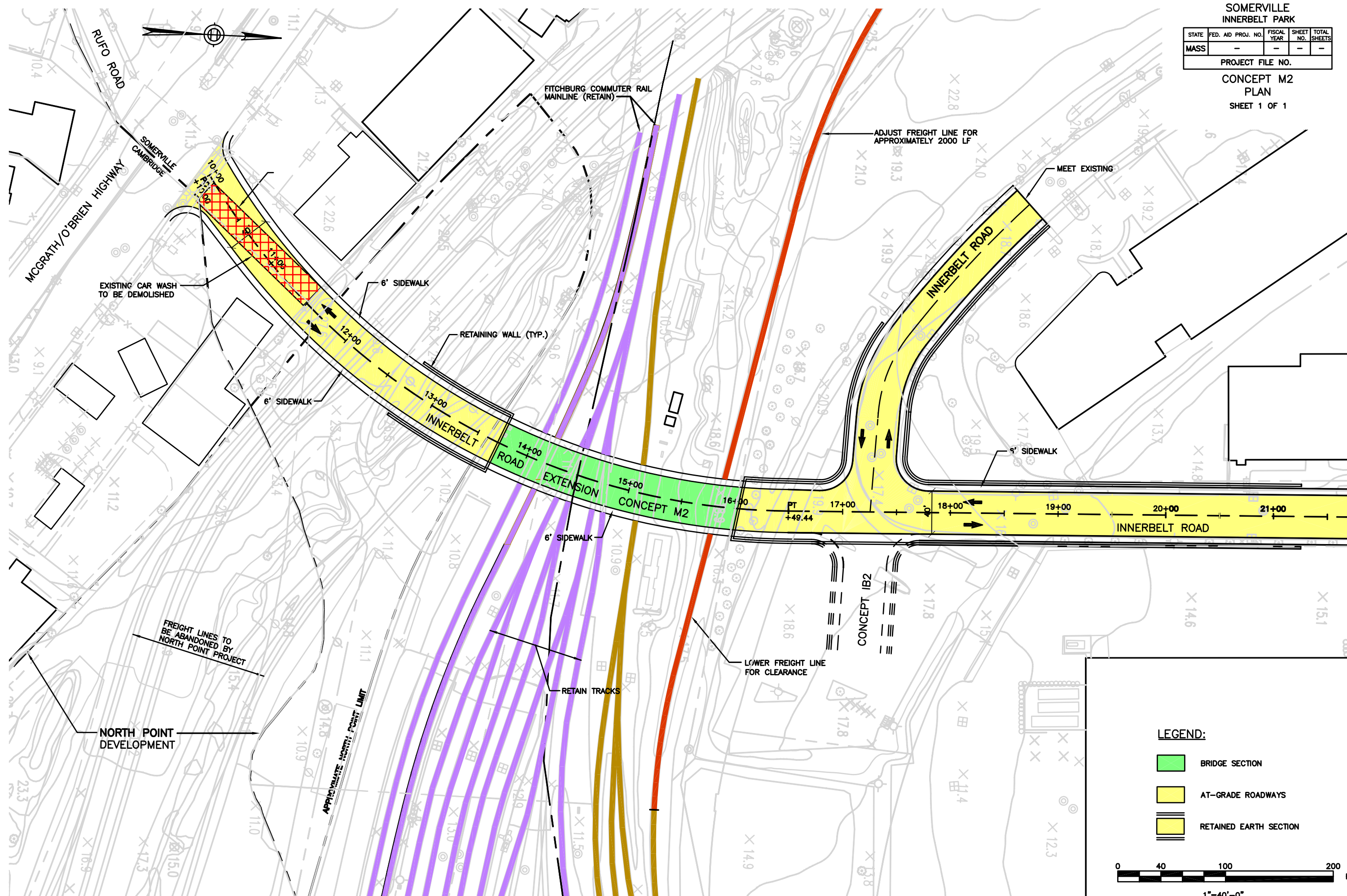
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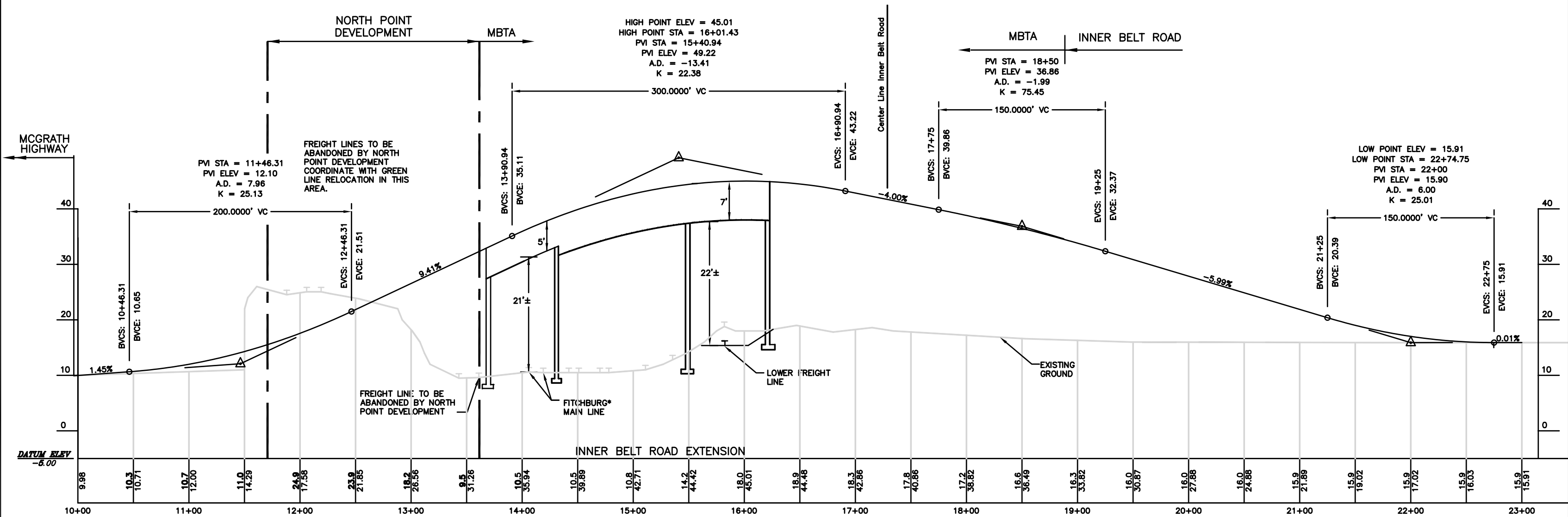
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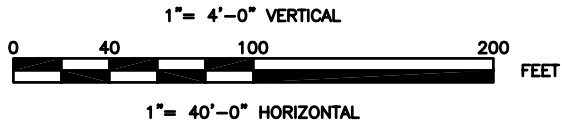


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MASS	-	-	-	-
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CONCEPT M2
PROFILE
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*NOTE: PROFILE DOESN'T ACCOUNT FOR CHANGES IN ELEVATION OF FITCHBURG LINE.



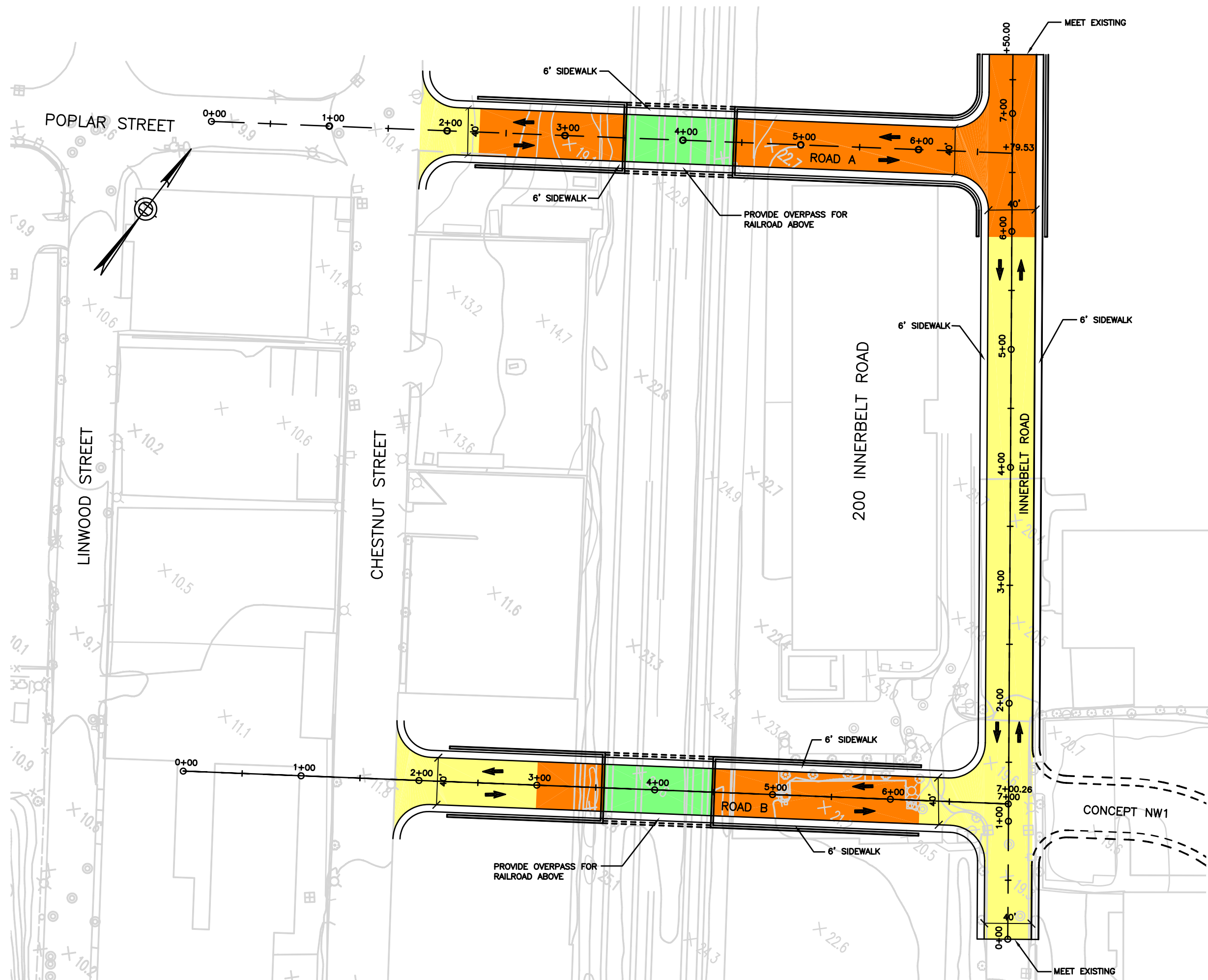
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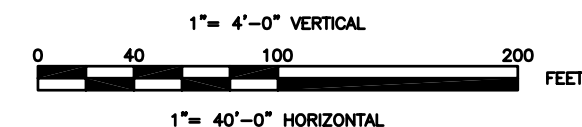
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CONCEPT M4
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SHEET 1 OF 1



STATE	FED. AID PROJ. NO.	FISCAL YEAR	SHEET NO.	TOTAL SHEETS
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PROJECT FILE NO.				



■ Chapter 5



■ Chapter 5

5.0 Introduction

The purpose of this chapter is to discuss the District Improvement Financing (DIF) legislation approved recently in Massachusetts and its applicability to fund the Somerville Inner Belt project.

The Somerville Inner Belt Access Study has proposed various roadway improvements in the Southern Inner Belt District. The cost of the proposed roadway improvements within the district range from \$20.2 million (to implement concepts IB1, M2 and M4) to \$34.8 million (to implement all improvements).

DIF is a new financing tool available to municipalities in Massachusetts that allows the allocation of increases in property tax levies to support infrastructure improvements. The following sections describe the DIF legislation in Massachusetts, its advantages and disadvantages compared to conventional funding for public infrastructure, the process for implementing DIF, and how this funding source could be used to fund the proposed Somerville Inner Belt project.

5.1 District Improvement Financing Legislation in Massachusetts

In July 2003, the Legislature of Massachusetts approved the District Improvement Financing statute. District Improvement Financing (DIF), more commonly known in other states as Tax Increment Financing (TIF), allows municipalities to create "Development Districts," and use future increases in property taxes within the development district to finance infrastructure improvements. Dedicated revenues from the increment in property value in the Development District are used to finance infrastructure improvements. These improvements encourage redevelopment, which in turn increases the value of property surrounding the redeveloped area.

Unlike other states, the DIF legislation in Massachusetts does not limit the implementation of DIF to blighted areas. The total area of all development districts within a municipality can not exceed 25 percent of the total area of the municipality, and the duration of a development district can not exceed 30 years. In addition, infrastructure improvements can be paid either on a "pay-as-you-go" basis or through the issuance of bonds. During the process of creating a "development district" and the "development plan," the municipality may designate "a particular development district as an "invested revenue district" to allow the use of bond financing to pay for the proposed infrastructure improvements. In that case, the "tax increment" levies are pledged to pay for debt service of the program bonds.

The designation of a "development district" shall be initially approved by the municipality, along with a "development program." Both the development district and the development program shall be submitted for approval to the Economic Assistance Coordinating Council (EACC), which is the body



within the Massachusetts Department of Business Development responsible to oversee the implementation of the DIF statewide.

DIF regulations were approved during the summer 2004 (402 Code of Massachusetts Regulations Section 3.00). Though no DIF has been enacted yet, various municipalities are already contemplating the use of DIF for their redevelopment plans, including Worcester and Lowell. In Worcester, DIF might be used for the redevelopment of Worcester Common Outlets and the South Worcester Industrial Park. In Lowell, officials plan to implement DIF for the redevelopment of the Hamilton Canal District. The city of Lowell needs funding to clean up 15 to 18 acres of land and to prepare a master plan for the site, which will include 800 to 1,000 housing units and commercial space. According to Kathy McCabe, from McCabe Enterprises, other municipalities, such as Holyoke, New Bedford and Attleborough are interested in creating redevelopment districts.

5.2 Advantages and Disadvantages of DIF

Figure 5.1 summarizes the advantages and disadvantages of DIF implementation, relative to "conventional funding", based on experience with tax increment financing from other states. Conventional funding for improvement projects at the local level includes the use of general funds on a "pay-as-you-go" basis, or using general obligation bonds.

5.3 DIF Implementation Measures

The implementation of DIF is a four step process, which involves:

1. Creation of a "development district" and a "development program;"
2. Local approval of "development district/program" following the procedures outlined in 402 CMR 3.04;
3. Application for approval of "development district/program" to the EACC, following the guidelines and procedures provided in 402 CMR 3.06 and 3.08
4. Once both the development district and the development program have been approved by the EACC, the municipality can move forward with the implementation of the DIF program. Once the DIF is in place, the municipality shall prepare annual status reports to the EACC, following the guidelines described in 402 CMR 3.12.

Appendix D includes a copy of the most recent version of 402 CMR 3.00 (as of July 2004). Note that the development district and the development program do not have to be approved simultaneously; however, it is required that both elements are approved by the EACC before any activity related to the development program is initiated.

As part of the local approval process, the municipality must create or designate a public or private entity to be responsible for the development district and the development plan, and to oversee the local approval process. The municipality shall hold public hearings and provide opportunities to submit written comments before the municipality governing body approves the development district and the development program.



Advantages of DIF	Disadvantages of DIF
<ul style="list-style-type: none"> • It can provide financing for projects that otherwise would not be economically feasible; • DIF bonds are not included in a city's general debt obligations (unless the debt financing vehicle uses general obligation bonds); • Once DIF bonds are retired, the city and other affected taxing units get the advantage of the full tax base and increased tax revenues • The city loses no tax revenue nor does it create another tax; instead it uses the property tax increment that result from public infrastructure improvement paid with TIF bonds. • Property owners in a redevelopment zone pay their full share of property taxes and property owners outside the zone are not required to pay more than their normal tax burden. • Development is financed from the increases in tax revenues that it generates, not by subsidy from other areas of the city. • Projects must be well-planned and economically feasible in order to attract bond investors; ill-conceived projects won't get off the ground. 	<ul style="list-style-type: none"> • If the tax increment does not materialize as planned, the city must find some other source of funds to prevent bond default; • DIF debt is more expensive to service because it is not backed by the full faith and credit of a city; • It is difficult to alter development plans once bonds have been issued, since bond buyers require assurances that limit flexibility. • While the projects appear to be self-financing, in reality taxpayers outside the redevelopment zone subsidize the projects by paying for increased service needs (fire, police, schools) that emerge as a result of redevelopment within the TIF district. On the other hand, DIF improvements may generate benefits to areas outside the TIF district. • Cities can abuse the program, capturing taxes on development that would have occurred without the DIF project or using captured tax revenue to provide basic city services.

Figure 5.1. Advantages and Disadvantages of DIF relative to Conventional Funding

Appendix E contains the application that municipalities must complete for EACC approval of the "development district/program." The "development district" application must :

- Contain plans or maps of the proposed development district and the immediate surrounding area with information on each parcel, including existing uses, ownership, current zoning;
- Show the assessed value of each parcel within the development district, most recent annual property tax levy, and information on unpaid taxes;
- Indicate if the proposed development district will contain an "invested revenue district," and indicate its boundaries;
- Identify what parcels within the "invested revenue district," if any, are subject already to a Tax Increment Financing agreement or other special tax assessment;
- Contain a statement describing why the municipality has defined the boundaries of the development district in the manner that is proposed;
- Contain a map of the municipality that includes all existing and proposed development districts, indicating what percentage of the total area of the municipality is comprised by each district;



- Provide certification stating that the area of all development districts do not exceed 25 percent of the total area of the municipality;
- Contain a statement identifying the duration of the proposed development district and a name for such district;
- Provide certification stating that the municipality complied with the local approval process;
- Include a copy of the written record of the public hearing(s), and any written comments regarding the proposed development district;
- Include a certified copy of the municipal approval for the development district.

The "development program" must include objectives and a detailed description of all development activities, as described in 402 CMR 3.08 and Section 4 of the DIF application. Among many other items, the development program must contain a statement of overall objectives, and specifics about the proposed development activities and projects, down to plans for individual buildings and who will be responsible. An important component of the development program includes a financial plan. According to the DIF application (Appendix E), the financial plan should:

- Contain projections of "captured assessed value" throughout the duration of the "development program," including all underlying assumptions;
- Identify the portion of the "captured assessed value" to be applied to the "development program," and provide estimates of the projected tax increments in each year of the program (including all assumptions);
- Describe the methodology to estimate the tax increments;
- Provide a projection of tax revenues to be derived in absence of the "development program;"
- Identify specific projects to be funded by the tax increments, and a cash flow that show the timing of the tax increments and the percentage of the projects' costs funded by this revenues;
- Provide the name of the officer or government body responsible for calculating the tax increments;
- Include the allocation of excess tax increments (if any).

If the development program includes an "investment revenue district development program," meaning that the municipality plans to issue bonds in conjunction with the DIF program, the municipality should provide a description of bond issues and debt obligations related to this the program, as described under 402 CMR 3.08(3)(e).

Applications received by the EACC shall be reviewed within 65 days of the receipt date. As shown in Figure 5.2, the approval of the "development district/program" is subject to meeting certain criteria, which is outlined in 402 CMR 3.07 and 3.09.

If the application is not approved, the EACC will send a written notice to the municipality, which includes a statement of reasons for denial of application. The municipalities may reapply for approval following the EACC procedures. Any changes to the development district and/or development program must follow the procedures described in 402 CMR 3.10, and receive EACC approval prior to implementation.



Criteria for Approval of Development District	Criteria for Approval of Development Program
<ul style="list-style-type: none"> • The application for such development district is complete; • The total area of all development districts within the municipalities does not exceed 25 percent; • The municipality has duly approved the development district; • Approval of the development district will significantly further the public purpose of encouraging increased residential, industrial, and commercial activity in the Commonwealth, as required by M.G.L. c. 40Q §2(a); and • It is reasonably probable that the municipality will achieve its goals in creating the district. 	<ul style="list-style-type: none"> • The application for such development district is complete; • The development program is to be undertaken within the development district approved by the municipality and the EACC; • The municipality has duly approved the development district; • The municipality has, in accordance to M.G.L. c.40Q §1, presented satisfactory assurances and evidence to the EACC that the development program will improve the quality of life, the physical facilities and structures, and the quality of pedestrian and vehicular traffic control and transportation within a development district; • Approval of the development program will further the public purpose of encouraging increased residential, industrial, and commercial activity in the Commonwealth, as required by M.G.L. c. 40Q §2(a); and • There is a reasonable probability that the municipality's financial plan, development strategies, and other project plans will allow it to achieve the stated goals of the development program.

Figure 5.2. Criteria for Approval of "Development District/Program" by EACC

After the "development district/program" is approved, the municipality can move forward with its implementation. The municipalities are required to prepare annual status reports to the EACC, describing the annual progress of the program, and the activities scheduled for the next five years, and for each five-year period thereafter. In addition, the EACC may request additional information on the development programs as the EACC deems necessary.

5.4 Appropriateness of Funding Mechanism

The success of DIF relies on attracting redevelopment into the "development district." Without such development, the property tax increments necessary to support the infrastructure financing plan will not materialize, and without the tax increment levies, the municipality will have to find other funding sources to cover debt service, or the bonds will go into default. Indeed, the City must have in place specific plans for the redevelopment in order to get approval for the DIF from the State.

Inner Belt Park Access Alternatives Study

City of Somerville, MA



The appropriateness of using DIF to fund the Inner Belt Access project will depend on how important the improvements will be to the feasibility of the development. By using the DIF mechanism, the City will be dedicating additional tax revenue to the infrastructure improvements (the road, and potentially other improvements the City may choose). The City should have a reasonable certainty that the development plans would not be viable without the infrastructure projects funded by the DIF, or the tax increment might best be applied to other needs.

Ultimately, the City will need to conduct more detailed studies and further prepare development plans to evaluate the development potential of the district and its relationship to the infrastructure improvements. In addition to helping the City make a more informed judgment, these efforts would ultimately be made part of the legally required State application requirements.

■ Appendix A

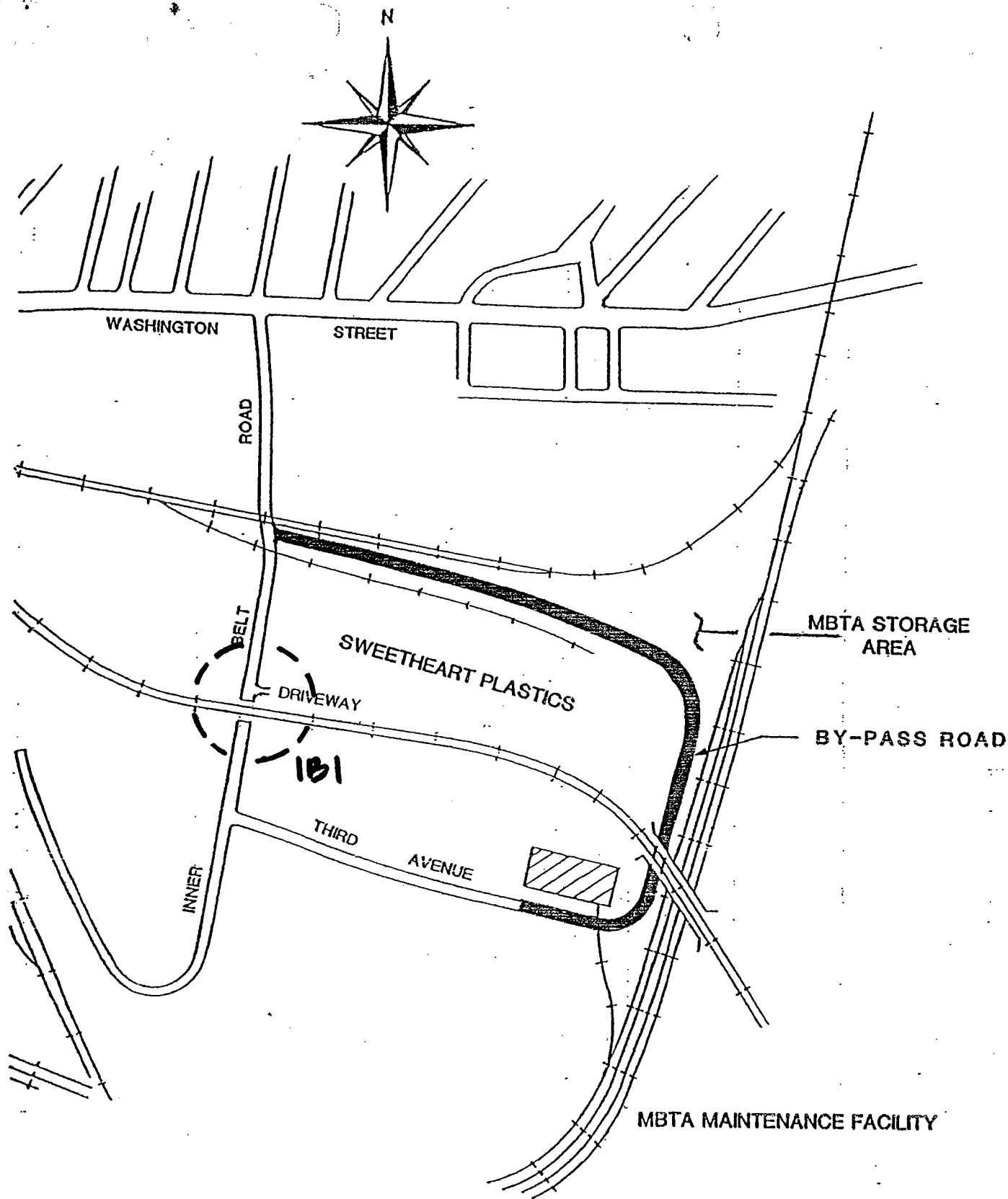


Figure 2

PROJECT MAP

NO SCALE



CONCLUSIONS AND RECOMMENDATIONS

The Engineering Feasibility Study and Traffic Analysis contained within this report conclude that the existing Inner Belt Roadway Tube Structure inhibits traffic flow, is substandard, and is hazardous to pedestrian and handicapped usage.

Universal Engineering Corporation explored and analyzed various bridge types, methods of construction, roadway widths, and alignments. This report recommends replacement of the tubes with a bridge structure that has adequate roadway clearance and sidewalk width to eliminate the existing safety problems and to accommodate future parcel development in the industrial area. The new structure will improve traffic flow by eliminating the truck clearance constraints and provide safe access for pedestrians and the handicapped.

After comparing two alternative bridge types, this report recommends that the proposed new bridge should be a double span structure (Alternative No. 1) with a center pier that would cost approximately three and one half million dollars (in 1988 prices). From an engineering perspective the double span structure offers the best roadway alignment, vertical clearance, and method of construction. It is estimated that the design and approval process will take one year to complete and the actual construction period will take an additional eight months.

Alternative No. 3 is an interim solution that was also developed in this study. It consists of a circumferential "by-pass" road utilizing the Sweetheart Plastics delivery driveway and a connection to an extension of Third Avenue. This road could also provide access to the MBTA facilities east of the project area. Based on the fact that both the City and the MBTA would benefit by the new access road, there exists the possibility that construction costs could be shared. The cost of this interim alternative, excluding right-of-way costs, is approximately nine hundred thousand dollars (in 1988 dollars). The roadway through the tubes would still be retained for passenger vehicle and pedestrian access. The roadway and sidewalks would have to be improved to provide a better travel surface and safer pedestrian movement.

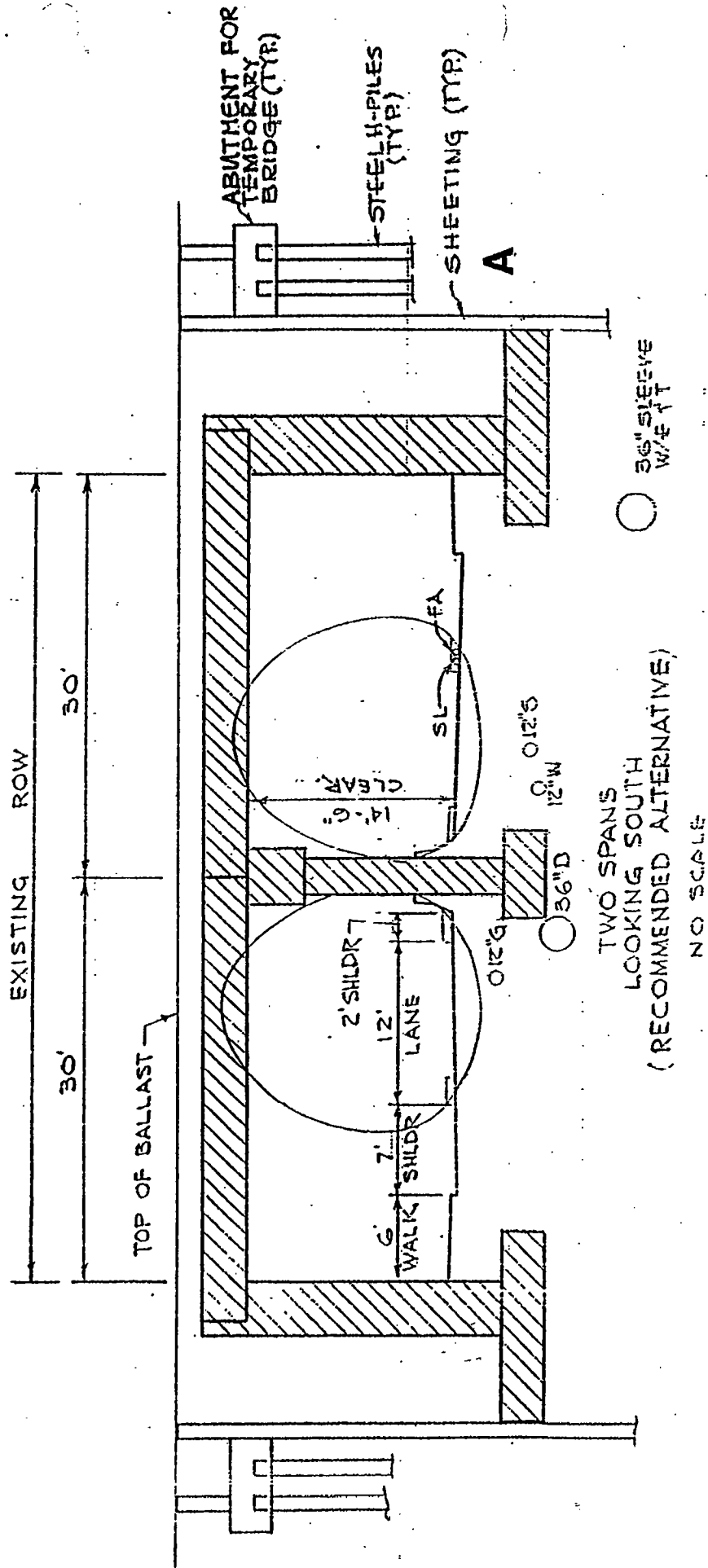
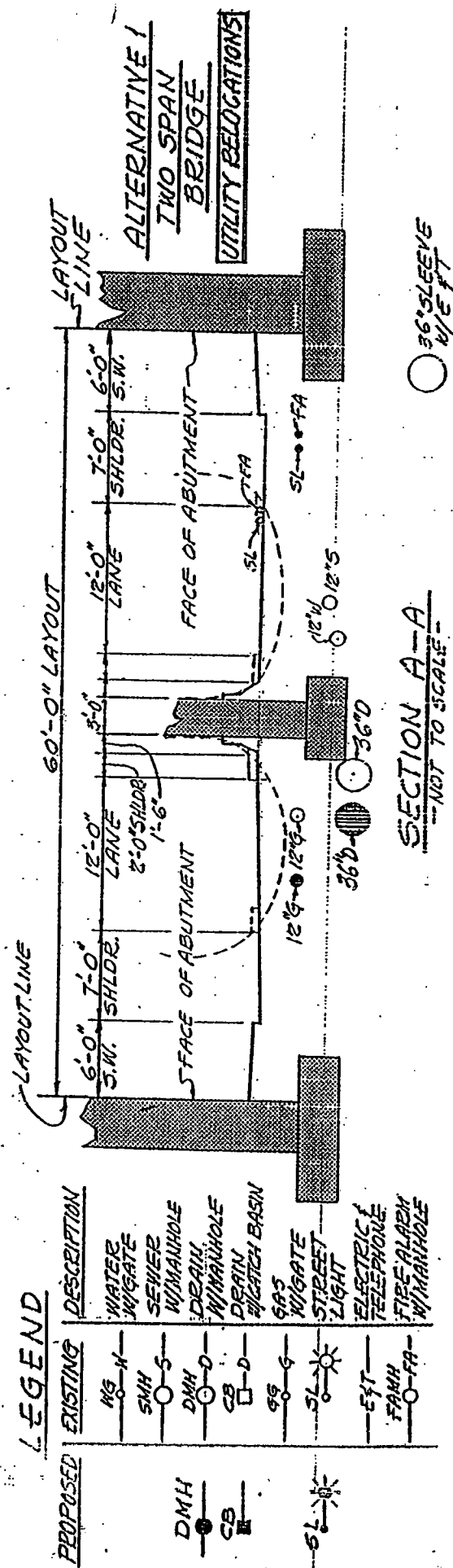


Figure 6: Alternative No. 1, Double-Span Bridge



Construction Method No. 3

1. Construct bypass road (detour) (see Figure 2).
2. Divert traffic from Inner Belt Road to the bypass road.
3. Divert rail traffic to the northerly rail.
4. Remove the southerly rail.
5. Install steel sheet piling parallel to Inner Belt Road along both sides of the tubes, in the southerly half of the embankment (see Figure 6, Point A).
6. Re-install the southerly rail and divert rail traffic to the southerly rail.
7. Remove the northerly rail.
8. Continue installing sheet piling through and to the northerly side of the embankment.
9. Construct the temporary bridge on an alignment slightly offset north of the northerly rail. This offset will allow sufficient clearance to permit rail service on the southerly rail (see Figure 5).
10. Divert rail traffic onto the temporary bridge.
11. Remove the southerly rail, excavate the embankment from the area between the two lines of steel sheeting on either side of Inner Belt Road and remove the tubes.
12. Partially construct the permanent bridge including the superstructure sufficient to install the southerly rail.
13. Divert rail traffic to the permanent bridge.



14. Remove the temporary bridge, complete the construction of the permanent bridge, and install the northerly rail.

15. Restore normal rail and roadway traffic.

Method Evaluation

Construction Method No. 1

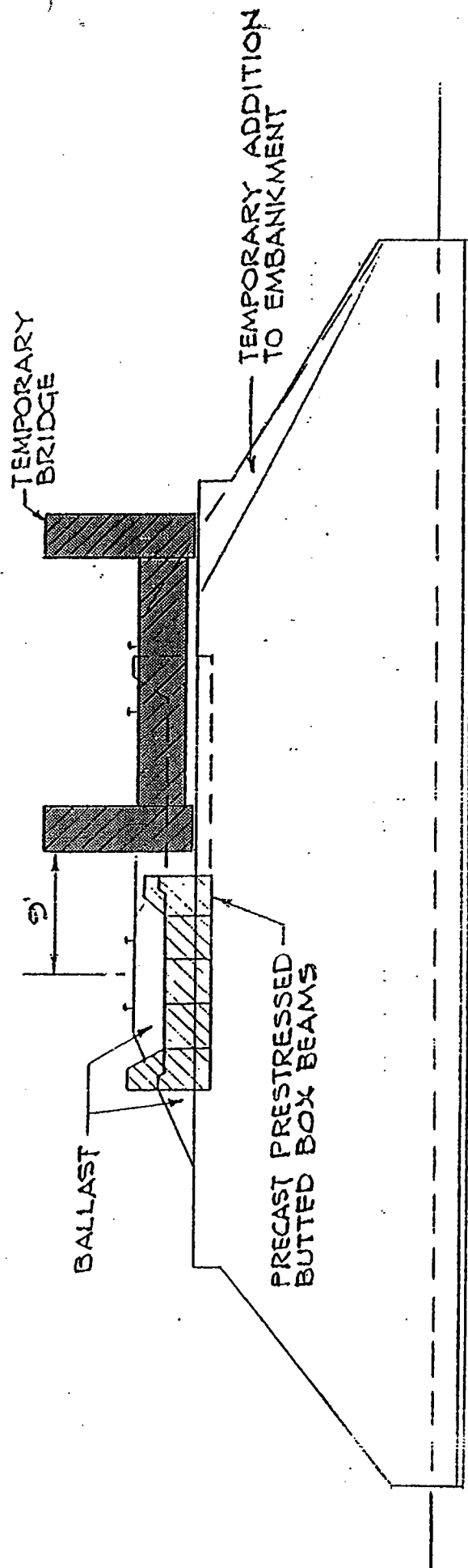
This method of construction was determined to be the most costly of the three methods. The higher costs were primarily attributable to the installation and removal of fill that would have to be placed and compacted on approximately 500 feet of the northerly embankment and then later removed. Also, the higher costs of this construction method included the cost of installing and removing steel sheeting along the full length of the filling.

Construction Method No. 2

This method was almost as costly as Construction Method No. 1 and would have required Inner Belt Road to be depressed approximately three feet within the limits of the bridge to achieve the required vertical clearance. This would have required the relocation of most of the utilities. It would also have required the complete shut-down of the rail service for long periods of time.

Construction Method No. 3

This method is the one recommended because it combines several construction features of Construction Methods No. 1 and 2 but will require minimum disruption of rail service and will not require the lowering of Inner Belt Road.



RAILROAD EMBANKMENT:

LOOKING WEST

NO SCALE

Figure 5: Construction Method No. 3



ANALYSIS OF PROPOSED ALTERNATIVES

Three Alternatives, two "Build" and one "No Build", were analyzed on the basis of costs. The costs associated with Alternatives 1 and 2 were based on using Construction Method No. 3. The three Alternatives are described as follows:

Alternative No. 1 - Two Span Bridge

The estimated construction cost for Alternative No. 1 is \$3,516,000 (in 1988 dollars). This is a two-span bridge with a supporting pier midway between the abutments (see Figures 6 and 7). Inner Belt Road will be divided into two roadways, one on either side of the pier, as it passes under the bridge. Each roadway will have a 12-foot wide travel lane, a 7-foot wide curbside shoulder, a 2-foot wide median shoulder, and a 6-foot wide sidewalk.

The two span bridge allows for a relatively shallow depth of superstructure, which in turn will provide the desired vertical roadway clearance without altering the profiles of the roadway, or the railroad.

Alternative No. 2 - Single Span Bridge

The estimated construction cost for this Alternative is \$3,414,000 (in 1988 dollars). The proposed bridge has a single, 40-foot long span over Inner Belt Road (see Figures 8 and 9). The 40-foot span is the absolute minimum that will allow the construction of a roadway and sidewalk section which conforms to standards.

The roadway will consist of two 12-foot wide travel lanes (one lane for each direction of travel), a 2-foot wide curbside shoulder, and two 6-foot wide sidewalks.

This proposed bridge span requires a deeper superstructure than in Alternative No. 1 which makes it necessary to depress the road under the bridge in order to attain the necessary vertical clearance. The depression of the roadway creates a potentially dangerous area for ponding and icing of stormwater and snow melt, requiring the perpetual attention of maintenance forces.

**TABLE 3: ESTIMATED CONSTRUCTION COSTS SUMMARY**

<u>CONSTRUCTION ELEMENT</u>	<u>ALTERNATIVE NO. 1</u>	<u>ALTERNATIVE NO. 2</u>	<u>ALTERNATIVE NO. 3</u>
Earthwork	74,200	72,800	109,000
Roadway (Inner Belt Road)	78,000	100,700	
Roadway (Bypass Road)			147,500
Drainage & Utilities	29,600	7,900	118,000
Lighting, Signs, Pavement Markings	5,000	5,000	70,000
Bridge-Permanent	792,000	743,500	
Bridge-Temporary	401,500	366,000	
Bypass Road-Temporary	291,000	291,000	
MBTA RR Costs	1,240,000	1,240,000	
B&M RR Costs			300,000
<u>SUBTOTAL</u>	<u>2,911,300</u>	<u>2,826,900</u>	<u>744,500</u>
Miscellaneous (5%)	145,600	141,300	37,200
<u>SUBTOTAL</u>	<u>3,056,900</u>	<u>2,968,200</u>	<u>781,700</u>
Contingencies (15%)	458,500	445,200	117,300
<u>TOTAL</u>	<u>3,515,400</u>	<u>3,413,400</u>	<u>899,000</u>

■ Appendix B



ORDER OF MAGNITUDE COST ESTIMATE
for
INNERBELT PARK
CONCEPT IB2
SOMERVILLE, MA

<i>Item</i>	<i>Units</i>	<i>Unit Cost</i>	<i>Quantity</i>	<i>Cost</i>
Roadway Items				
1. 1-Lane Ramp (22')	LF	\$ 198.43	0	\$0
2. 2-Lane Roadway w/o Sidewalk - 4 ft Shldr	LF	\$ 234.60	0	\$0
3. 2-Lane Roadway w/ 1 Sidewalk - 4 ft Shldr	LF	\$ 254.45	0	\$0
4. 2-Lane Roadway w/ 2 Sidewalk - 8 ft Shldr	LF	\$ 344.86	3,250	\$1,120,800
5. 2-Lane Boat Section w/ 1 Sidewalk - 4 ft Shldr - Av. Depth = 5'	LF	\$ 3,863.31	0	\$0
6. 2-Lane Boat Section w/ 1 Sidewalk - 4 ft Shldr - Av. Depth = 10'	LF	\$ 4,366.24	0	\$0
7. 2-Lane Retained Fill Section w/ 2 Sidewalk - 8 ft Shldr - Avg. Ht. = 5'	LF	\$ 2,162.29	0	\$0
8. 2-Lane Retained Fill Section w/ 2 Sidewalk - 8 ft Shldr - Avg. Ht. = 10'	LF	\$ 2,242.58	0	\$0
9. 2-Lane Embankment Section w/ 2 Sidewalk - 8 ft Shldr - Avg. Ht. = 5'	LF	\$ 512.87	0	\$0
10. 2-Lane Embankment Section w/ 2 Sidewalk - 8 ft Shldr - Avg. Ht. = 10'	LF	\$ 703.98	0	\$0
11. 2-Lane Depressed Section w/ 2 Sidewalk - 8 ft Shldr - Avg. Depth = 5'	LF	\$ 1,760.21	0	\$0
12. 2-Lane Depressed Section w/ 2 Sidewalk - 8 ft Shldr - Avg. Depth = 10'	LF	\$ 2,404.66	0	\$0
Subtotal =				\$1,120,800
Calculated Quantities				
1. Pump Stations	EA	\$ 300,000.00	0	\$0
2. Roadway Bridges	SF	\$ 200.00	0	\$0
3. Pedestrian/Bikeway Bridges	SF	\$ 120.00	0	\$0
4. Building Demolition	SF	\$ 5.00	0	\$0
5. Track Removal	LF	\$ 9.14	6,000	\$54,864
6. Lower Railroad Track	LF	\$ 337.37	0	\$0
7. At Grade Railroad Crossing	LF	\$ 121.92	480	\$58,522
8. Railroad Track Realignment	LF	\$ 325.00	600	\$195,000
9. Bike Path	LF	\$ 45.00	0	\$0
Subtotal =				\$308,386
General Costs				
1. Clearing and Grubbing	1%			\$14,292
2. Utility Relocation	5%			\$71,459
3. Landscaping	3%			\$42,876
4. Maintenance of Traffic	5%			\$71,459
5. Demolition	0%			\$0
6. Hazardous Material Removal	0% (Hazardous Material Removal is not included in this estimate)			\$0
7. Right of Way	0% (Right of Way is not included in this estimate)			\$0
8. Electrical and Mechanical Work	5%			\$71,459
9. Mobilization	5%			\$71,459
Subtotal =				\$343,004
TOTAL				\$1,772,190
Escalation ¹				5.87% \$104,060
Contingency				20% \$375,249.94
Total				\$2,251,500
SAY				\$ 2,300,000

Notes:

¹ Escalation based on ENR Construction Cost Index, Escalation from 2002 average to 2004 year to date average



ORDER OF MAGNITUDE COST ESTIMATE

for
INNERBELT PARK
CONCEPT NW1 (Part 1)
SOMERVILLE, MA

<i>Item</i>	<i>Units</i>	<i>Unit Cost</i>	<i>Quantity</i>	<i>Cost</i>
Roadway Items				
1. 1-Lane Ramp (22')	LF	\$ 198.43	0	\$0
2. 2-Lane Roadway w/o Sidewalk - 4 ft Shldr	LF	\$ 234.60	0	\$0
3. 2-Lane Roadway w/ 1 Sidewalk - 4 ft Shldr	LF	\$ 254.45	0	\$0
4. 2-Lane Roadway w/ 2 Sidewalk - 8 ft Shldr	LF	\$ 344.86	3,300	\$1,138,043
5. 2-Lane Boat Section w/ 1 Sidewalk - 4 ft Shldr - Av. Depth = 5'	LF	\$ 3,863.31	0	\$0
6. 2-Lane Boat Section w/ 1 Sidewalk - 4 ft Shldr - Av. Depth = 10'	LF	\$ 4,366.24	0	\$0
7. 2-Lane Retained Fill Section w/ 2 Sidewalk - 8 ft Shldr - Avg. Ht. = 5'	LF	\$ 2,162.29	0	\$0
8. 2-Lane Retained Fill Section w/ 2 Sidewalk - 8 ft Shldr - Avg. Ht. = 10'	LF	\$ 2,242.58	0	\$0
9. 2-Lane Embankment Section w/ 2 Sidewalk - 8 ft Shldr - Avg. Ht. = 5'	LF	\$ 512.87	0	\$0
10. 2-Lane Embankment Section w/ 2 Sidewalk - 8 ft Shldr - Avg. Ht. = 10'	LF	\$ 703.98	0	\$0
11. 2-Lane Depressed Section w/ 2 Sidewalk - 8 ft Shldr - Avg. Depth = 5'	LF	\$ 1,760.21	0	\$0
12. 2-Lane Depressed Section w/ 2 Sidewalk - 8 ft Shldr - Avg. Depth = 10'	LF	\$ 2,404.66	0	\$0
Subtotal =				\$1,138,043
Calculated Quantities				
1. Pump Stations	EA	\$ 300,000.00	0	\$0
2. Roadway Bridges	SF	\$ 200.00	0	\$0
3. Pedestrian/Bikeway Bridges	SF	\$ 120.00	0	\$0
4. Building Demolition	SF	\$ 5.00	0	\$0
5. Track Removal	LF	\$ 9.14	0	\$0
6. Lower Railroad Track	LF	\$ 337.37	0	\$0
7. At Grade Railroad Crossing	LF	\$ 121.92	0	\$0
8. Railroad Track Realignment	LF	\$ 325.00	0	\$0
9. Bike Path	LF	\$ 45.00	0	\$0
Subtotal =				\$0
General Costs				
1. Clearing and Grubbing	1%			\$11,380
2. Utility Relocation	5%			\$56,902
3. Landscaping	3%			\$34,141
4. Maintenance of Traffic	5%			\$56,902
5. Demolition	0%			\$0
6. Hazardous Material Removal	0% (Hazardous Material Removal is not included in this estimate)			\$0
7. Right of Way	0% (Right of Way is not included in this estimate)			\$0
8. Electrical and Mechanical Work	5%			\$56,902
9. Mobilization	5%			\$56,902
Subtotal =				\$273,130
TOTAL				\$1,411,173
Escalation ¹				5.87%
Contingency				20%
Total				\$1,792,842
SAY				\$ 1,800,000

Notes:

¹ Escalation based on ENR Construction Cost Index, Escalation from 2002 average to 2004 year to date average



ORDER OF MAGNITUDE COST ESTIMATE
for
INNERBELT PARK
CONCEPT NW1 (Part 2) (Depressed Section Assumed)
SOMERVILLE, MA

<i>Item</i>	<i>Units</i>	<i>Unit Cost</i>	<i>Quantity</i>	<i>Cost</i>
Roadway Items				
1. 1-Lane Ramp (22')	LF	\$ 198.43	0	\$0
2. 2-Lane Roadway w/o Sidewalk - 4 ft Shldr	LF	\$ 234.60	0	\$0
3. 2-Lane Roadway w/ 1 Sidewalk - 4 ft Shldr	LF	\$ 254.45	0	\$0
4. 2-Lane Roadway w/ 2 Sidewalk - 8 ft Shldr	LF	\$ 344.86	800	\$275,889
5. 2-Lane Boat Section w/ 1 Sidewalk - 4 ft Shldr - Av. Depth = 5'	LF	\$ 3,863.31	0	\$0
6. 2-Lane Boat Section w/ 1 Sidewalk - 4 ft Shldr - Av. Depth = 10'	LF	\$ 4,366.24	0	\$0
7. 2-Lane Retained Fill Section w/ 2 Sidewalk - 8 ft Shldr - Avg. Ht. = 5'	LF	\$ 2,162.29	0	\$0
8. 2-Lane Retained Fill Section w/ 2 Sidewalk - 8 ft Shldr - Avg. Ht. = 10'	LF	\$ 2,242.58	0	\$0
9. 2-Lane Embankment Section w/ 2 Sidewalk - 8 ft Shldr - Avg. Ht. = 5'	LF	\$ 512.87	0	\$0
10. 2-Lane Embankment Section w/ 2 Sidewalk - 8 ft Shldr - Avg. Ht. = 10'	LF	\$ 703.98	0	\$0
11. 2-Lane Depressed Section w/ 2 Sidewalk - 8 ft Shldr - Avg. Depth = 5'	LF	\$ 1,760.21	0	\$0
12. 2-Lane Depressed Section w/ 2 Sidewalk - 8 ft Shldr - Avg. Depth = 10'	LF	\$ 2,404.66	750	\$1,803,495
Subtotal =				\$2,079,384
Calculated Quantities				
1. Pump Stations	EA	\$ 300,000.00	0	\$0
2. Roadway Bridges	SF	\$ 200.00	5,400	\$1,080,000
3. Pedestrian/Bikeway Bridges	SF	\$ 120.00	0	\$0
4. Building Demolition	SF	\$ 5.00	0	\$0
5. Track Removal	LF	\$ 9.14	1,400	\$12,802
6. Lower Railroad Track	LF	\$ 337.37	0	\$0
7. At Grade Railroad Crossing	LF	\$ 121.92	0	\$0
8. Railroad Track Realignment	LF	\$ 325.00	0	\$0
9. Bike Path	LF	\$ 45.00	0	\$0
Subtotal =				\$1,092,802
General Costs				
1. Clearing and Grubbing	1%			\$31,722
2. Utility Relocation	5%			\$158,609
3. Landscaping	3%			\$95,166
4. Maintenance of Traffic	5%			\$158,609
5. Demolition	0%			\$0
6. Hazardous Material Removal	0% (Hazardous Material Removal is not included in this estimate)			\$0
7. Right of Way	0% (Right of Way is not included in this estimate)			\$0
8. Electrical and Mechanical Work	5%			\$158,609
9. Mobilization	5%			\$158,609
Subtotal =				\$761,325
TOTAL				\$3,933,510
Escalation ¹				5.87% \$230,969
Contingency				20% \$832,895.94
Total				\$4,997,376
SAY				\$ 5,000,000

Notes:

¹ Escalation based on ENR Construction Cost Index, Escalation from 2002 average to 2004 year to date average



ORDER OF MAGNITUDE COST ESTIMATE
for
INNERBELT PARK
CONCEPT NW1 (Part 2) (Boat Section Assumed)
SOMERVILLE, MA

<i>Item</i>	<i>Units</i>	<i>Unit Cost</i>	<i>Quantity</i>	<i>Cost</i>
Roadway Items				
1. 1-Lane Ramp (22')	LF	\$ 198.43	0	\$0
2. 2-Lane Roadway w/o Sidewalk - 4 ft Shldr	LF	\$ 234.60	0	\$0
3. 2-Lane Roadway w/ 1 Sidewalk - 4 ft Shldr	LF	\$ 254.45	0	\$0
4. 2-Lane Roadway w/ 2 Sidewalk - 8 ft Shldr	LF	\$ 344.86	800	\$275,889
5. 2-Lane Boat Section w/ 1 Sidewalk - 4 ft Shldr - Av. Depth = 5'	LF	\$ 3,863.31	0	\$0
6. 2-Lane Boat Section w/ 1 Sidewalk - 4 ft Shldr - Av. Depth = 10'	LF	\$ 4,366.24	750	\$3,274,678
7. 2-Lane Retained Fill Section w/ 2 Sidewalk - 8 ft Shldr - Avg. Ht. = 5'	LF	\$ 2,162.29	0	\$0
8. 2-Lane Retained Fill Section w/ 2 Sidewalk - 8 ft Shldr - Avg. Ht. = 10'	LF	\$ 2,242.58	0	\$0
9. 2-Lane Embankment Section w/ 2 Sidewalk - 8 ft Shldr - Avg. Ht. = 5'	LF	\$ 512.87	0	\$0
10. 2-Lane Embankment Section w/ 2 Sidewalk - 8 ft Shldr - Avg. Ht. = 10'	LF	\$ 703.98	0	\$0
11. 2-Lane Depressed Section w/ 2 Sidewalk - 8 ft Shldr - Avg. Depth = 5'	LF	\$ 1,760.21	0	\$0
12. 2-Lane Depressed Section w/ 2 Sidewalk - 8 ft Shldr - Avg. Depth = 10'	LF	\$ 2,404.66	0	\$0
Subtotal =				\$3,550,567
Calculated Quantities				
1. Pump Stations	EA	\$ 300,000.00	0	\$0
2. Roadway Bridges	SF	\$ 200.00	5,400	\$1,080,000
3. Pedestrian/Bikeway Bridges	SF	\$ 120.00	0	\$0
4. Building Demolition	SF	\$ 5.00	0	\$0
5. Track Removal	LF	\$ 9.14	1,400	\$12,802
6. Lower Railroad Track	LF	\$ 337.37	0	\$0
7. At Grade Railroad Crossing	LF	\$ 121.92	0	\$0
8. Railroad Track Realignment	LF	\$ 325.00	0	\$0
9. Bike Path	LF	\$ 45.00	0	\$0
Subtotal =				\$1,092,802
General Costs				
1. Clearing and Grubbing	1%			\$46,434
2. Utility Relocation	5%			\$232,168
3. Landscaping	3%			\$139,301
4. Maintenance of Traffic	5%			\$232,168
5. Demolition	0%			\$0
6. Hazardous Material Removal	0% (Hazardous Material Removal is not included in this estimate)			\$0
7. Right of Way	0% (Right of Way is not included in this estimate)			\$0
8. Electrical and Mechanical Work	5%			\$232,168
9. Mobilization	5%			\$232,168
Subtotal =				\$1,114,408
TOTAL				\$5,757,777
		Escalation ¹	5.87%	\$338,088
		Contingency	20%	\$1,219,172.86
		Total		\$7,315,037
		SAY	\$	7,400,000

Notes:

¹ Escalation based on ENR Construction Cost Index, Escalation from 2002 average to 2004 year to date average



ORDER OF MAGNITUDE COST ESTIMATE

for
INNERBELT PARK
CONCEPT M2
SOMERVILLE, MA

<i>Item</i>	<i>Units</i>	<i>Unit Cost</i>	<i>Quantity</i>	<i>Cost</i>
Roadway Items				
1. 1-Lane Ramp (22')	LF	\$ 198.43	0	\$0
2. 2-Lane Roadway w/o Sidewalk - 4 ft Shldr	LF	\$ 234.60	0	\$0
3. 2-Lane Roadway w/ 1 Sidewalk - 4 ft Shldr	LF	\$ 254.45	0	\$0
4. 2-Lane Roadway w/ 2 Sidewalk - 8 ft Shldr	LF	\$ 344.86	500	\$172,431
5. 2-Lane Boat Section w/ 1 Sidewalk - 4 ft Shldr - Av. Depth = 5'	LF	\$ 3,863.31	0	\$0
6. 2-Lane Boat Section w/ 1 Sidewalk - 4 ft Shldr - Av. Depth = 10'	LF	\$ 4,366.24	0	\$0
7. 2-Lane Retained Fill Section w/ 2 Sidewalk - 8 ft Shldr - Avg. Ht. = 5'	LF	\$ 2,162.29	0	\$0
8. 2-Lane Retained Fill Section w/ 2 Sidewalk - 8 ft Shldr - Avg. Ht. = 10'	LF	\$ 2,242.58	700	\$1,569,804
9. 2-Lane Embankment Section w/ 2 Sidewalk - 8 ft Shldr - Avg. Ht. = 5'	LF	\$ 512.87	0	\$0
10. 2-Lane Embankment Section w/ 2 Sidewalk - 8 ft Shldr - Avg. Ht. = 10'	LF	\$ 703.98	0	\$0
11. 2-Lane Depressed Section w/ 2 Sidewalk - 8 ft Shldr - Avg. Depth = 5'	LF	\$ 1,760.21	0	\$0
12. 2-Lane Depressed Section w/ 2 Sidewalk - 8 ft Shldr - Avg. Depth = 10'	LF	\$ 2,404.66	0	\$0
Subtotal =				\$1,742,234
Calculated Quantities				
1. Pump Stations	EA	\$ 300,000.00	0	\$0
2. Roadway Bridges	SF	\$ 200.00	13,800	\$2,760,000
3. Pedestrian/Bikeway Bridges	SF	\$ 120.00	0	\$0
4. Building Demolition	SF	\$ 5.00	3,500	\$17,500
5. Track Removal	LF	\$ 9.14	0	\$0
6. Lower Railroad Track	LF	\$ 337.37	2,000	\$674,743
7. At Grade Railroad Crossing	LF	\$ 121.92	0	\$0
8. Railroad Track Realignment	LF	\$ 325.00	0	\$0
9. Bike Path	LF	\$ 45.00	0	\$0
Subtotal =				\$3,452,243
General Costs				
1. Clearing and Grubbing	1%			\$51,945
2. Utility Relocation	5%			\$259,724
3. Landscaping	3%			\$155,834
4. Maintenance of Traffic	5%			\$259,724
5. Demolition	0%			\$0
6. Hazardous Material Removal	0% (Hazardous Material Removal is not included in this estimate)			\$0
7. Right of Way	0% (Right of Way is not included in this estimate)			\$0
8. Electrical and Mechanical Work	5%			\$259,724
9. Mobilization	5%			\$259,724
Subtotal =				\$1,246,675
TOTAL				\$6,441,152
Escalation ¹				5.87%
Contingency				20%
Total				\$8,183,239
SAY				\$ 8,200,000

Notes:

¹ Escalation based on ENR Construction Cost Index, Escalation from 2002 average to 2004 year to date average



ORDER OF MAGNITUDE COST ESTIMATE
for
INNERBELT PARK
CONCEPT M4 (Depressed Section Assumed)
SOMERVILLE, MA

<i>Item</i>	<i>Units</i>	<i>Unit Cost</i>	<i>Quantity</i>	<i>Cost</i>
Roadway Items				
1. 1-Lane Ramp (22')	LF	\$ 198.43	0	\$0
2. 2-Lane Roadway w/o Sidewalk - 4 ft Shldr	LF	\$ 234.60	0	\$0
3. 2-Lane Roadway w/ 1 Sidewalk - 4 ft Shldr	LF	\$ 254.45	0	\$0
4. 2-Lane Roadway w/ 2 Sidewalk - 8 ft Shldr	LF	\$ 344.86	850	\$293,132
5. 2-Lane Boat Section w/ 1 Sidewalk - 4 ft Shldr - Av. Depth = 5'	LF	\$ 3,863.31	0	\$0
6. 2-Lane Boat Section w/ 1 Sidewalk - 4 ft Shldr - Av. Depth = 10'	LF	\$ 4,366.24	0	\$0
7. 2-Lane Retained Fill Section w/ 2 Sidewalk - 8 ft Shldr - Avg. Ht. = 5'	LF	\$ 2,162.29	0	\$0
8. 2-Lane Retained Fill Section w/ 2 Sidewalk - 8 ft Shldr - Avg. Ht. = 10'	LF	\$ 2,242.58	0	\$0
9. 2-Lane Embankment Section w/ 2 Sidewalk - 8 ft Shldr - Avg. Ht. = 5'	LF	\$ 512.87	0	\$0
10. 2-Lane Embankment Section w/ 2 Sidewalk - 8 ft Shldr - Avg. Ht. = 10'	LF	\$ 703.98	0	\$0
11. 2-Lane Depressed Section w/ 2 Sidewalk - 8 ft Shldr - Avg. Depth = 5'	LF	\$ 1,760.21	0	\$0
12. 2-Lane Depressed Section w/ 2 Sidewalk - 8 ft Shldr - Avg. Depth = 10'	LF	\$ 2,404.66	850	\$2,043,961
Subtotal =				\$2,337,093
Calculated Quantities				
1. Pump Stations	EA	\$ 300,000.00	0	\$0
2. Roadway Bridges	SF	\$ 200.00	12,000	\$2,400,000
3. Pedestrian/Bikeway Bridges	SF	\$ 120.00	0	\$0
4. Building Demolition	SF	\$ 5.00	0	\$0
5. Track Removal	LF	\$ 9.14	0	\$0
6. Lower Railroad Track	LF	\$ 337.37	0	\$0
7. At Grade Railroad Crossing	LF	\$ 121.92	0	\$0
8. Railroad Track Realignment	LF	\$ 325.00	0	\$0
9. Bike Path	LF	\$ 45.00	0	\$0
Subtotal =				\$2,400,000
General Costs				
1. Clearing and Grubbing	1%			\$47,371
2. Utility Relocation	5%			\$236,855
3. Landscaping	3%			\$142,113
4. Maintenance of Traffic	5%			\$236,855
5. Demolition	0%			\$0
6. Hazardous Material Removal	0% (Hazardous Material Removal is not included in this estimate)			\$0
7. Right of Way	0% (Right of Way is not included in this estimate)			\$0
8. Electrical and Mechanical Work	5%			\$236,855
9. Mobilization	5%			\$236,855
Subtotal =				\$1,136,902
TOTAL				\$5,873,995
Escalation ¹				5.87% \$344,912
Contingency				20% \$1,243,781.43
Total				\$7,462,689
SAY				\$ 7,500,000

Notes:

¹ Escalation based on ENR Construction Cost Index, Escalation from 2002 average to 2004 year to date average



ORDER OF MAGNITUDE COST ESTIMATE
for
INNERBELT PARK
CONCEPT M4 (Boat Section Assumed)
SOMERVILLE, MA

<i>Item</i>	<i>Units</i>	<i>Unit Cost</i>	<i>Quantity</i>	<i>Cost</i>
Roadway Items				
1. 1-Lane Ramp (22')	LF	\$ 198.43	0	\$0
2. 2-Lane Roadway w/o Sidewalk - 4 ft Shldr	LF	\$ 234.60	0	\$0
3. 2-Lane Roadway w/ 1 Sidewalk - 4 ft Shldr	LF	\$ 254.45	0	\$0
4. 2-Lane Roadway w/ 2 Sidewalk - 8 ft Shldr	LF	\$ 344.86	850	\$293,132
5. 2-Lane Boat Section w/ 1 Sidewalk - 4 ft Shldr - Av. Depth = 5'	LF	\$ 3,863.31	0	\$0
6. 2-Lane Boat Section w/ 1 Sidewalk - 4 ft Shldr - Av. Depth = 10'	LF	\$ 4,366.24	850	\$3,711,301
7. 2-Lane Retained Fill Section w/ 2 Sidewalk - 8 ft Shldr - Avg. Ht. = 5'	LF	\$ 2,162.29	0	\$0
8. 2-Lane Retained Fill Section w/ 2 Sidewalk - 8 ft Shldr - Avg. Ht. = 10'	LF	\$ 2,242.58	0	\$0
9. 2-Lane Embankment Section w/ 2 Sidewalk - 8 ft Shldr - Avg. Ht. = 5'	LF	\$ 512.87	0	\$0
10. 2-Lane Embankment Section w/ 2 Sidewalk - 8 ft Shldr - Avg. Ht. = 10'	LF	\$ 703.98	0	\$0
11. 2-Lane Depressed Section w/ 2 Sidewalk - 8 ft Shldr - Avg. Depth = 5'	LF	\$ 1,760.21	0	\$0
12. 2-Lane Depressed Section w/ 2 Sidewalk - 8 ft Shldr - Avg. Depth = 10'	LF	\$ 2,404.66	0	\$0
Subtotal =				\$4,004,434
Calculated Quantities				
1. Pump Stations	EA	\$ 300,000.00	1	\$300,000
2. Roadway Bridges	SF	\$ 200.00	12,000	\$2,400,000
3. Pedestrian/Bikeway Bridges	SF	\$ 120.00	0	\$0
4. Building Demolition	SF	\$ 5.00	0	\$0
5. Track Removal	LF	\$ 9.14	0	\$0
6. Lower Railroad Track	LF	\$ 337.37	0	\$0
7. At Grade Railroad Crossing	LF	\$ 121.92	0	\$0
8. Railroad Track Realignment	LF	\$ 325.00	0	\$0
9. Bike Path	LF	\$ 45.00	0	\$0
Subtotal =				\$2,700,000
General Costs				
1. Clearing and Grubbing	1%			\$67,044
2. Utility Relocation	5%			\$335,222
3. Landscaping	3%			\$201,133
4. Maintenance of Traffic	5%			\$335,222
5. Demolition	0%			\$0
6. Hazardous Material Removal	0% (Hazardous Material Removal is not included in this estimate)			\$0
7. Right of Way	0% (Right of Way is not included in this estimate)			\$0
8. Electrical and Mechanical Work	5%			\$335,222
9. Mobilization	5%			\$335,222
Subtotal =				\$1,609,064
TOTAL				\$8,313,498
Escalation ¹				5.87% \$488,155
Contingency				20% \$1,760,330.59
Total				\$10,561,984
SAY				\$ 10,600,000

Notes:

¹ Escalation based on ENR Construction Cost Index, Escalation from 2002 average to 2004 year to date average

■ Appendix C

402 CMR: ECONOMIC ASSISTANCE COORDINATING COUNCIL

402 CMR 3.00: DISTRICT IMPROVEMENT FINANCING

Section

- 3.01: Purpose and Scope
- 3.02: Overview and Applicability of District Improvement Financing Program
- 3.03: Definitions
- 3.04: Local Approval Process
- 3.05: General Procedures Governing Filing and Review of DIF Applications
- 3.06: Applying for Approval of a Development District
- 3.07: Approval of Proposed Development Districts
- 3.08: Applying for Approval of a Development Program
- 3.09: Approval of Proposed Development Programs
- 3.10: Amendments to Development Districts and Development Programs
- 3.11: Written and Oral Comments From Interested Parties
- 3.12: Status Reports
- 3.13: Public Participation During Implementation of Development Program
- 3.14: Noncompliance By Municipality
- 3.15: Municipal Recordkeeping
- 3.16: Technical Assistance
- 3.17: Miscellaneous
- 3.18: Emergency Waiver

3.01: Purpose and Scope

The purpose of 402 CMR 3.01 through 3.18 is to establish the procedures by which the Economic Assistance Coordinating Council (EACC) will administer the District Improvement Financing (DIF) program codified in M.G.L. c. 40Q. Specifically, pursuant to M.G.L. c.40Q § 2, the EACC is responsible for reviewing and approving proposed “development districts” and “development programs” that are adopted by cities and towns in the Commonwealth seeking to take advantage of the DIF program. 402 CMR 3.00 describes:

- (a) certain requirements that must be met by towns and cities in obtaining local approval of a development district and development program;
- (b) the procedures that towns and cities should follow in applying for EACC approval of development districts and development programs;
- (c) the procedures, criteria and considerations that will govern the EACC’s determination of whether to approve a particular development district and development program; and
- (d) related procedural and administrative issues pertaining to the EACC’s role in the DIF program.

3.02: Overview and Applicability of District Improvement Financing Program

(1) In General. The District Improvement Financing program is available to all cities and towns in the Commonwealth. The program provides municipalities with a variety of tools to promote development in targeted geographic areas. In particular, the DIF program enables municipalities to finance public works and infrastructure projects in a designated area by “capturing” the increase in property tax revenues derived from new housing, commercial or industrial activity in that area and applying such revenues towards the municipality’s development program. Such incremental revenues can either directly pay for the planned municipal improvements (from year to year) or they can be estimated and pledged in advance towards the repayment of bonds to be issued by the municipality to pay for the municipal improvements.

(2) Basic Process. Under the program, a municipality may propose a specific “development program” that it intends to undertake within an identified “development district”. All of the development districts within a municipality may not together comprise more than 25% of the total area of the municipality. Each such development district and development program must be approved by the EACC.

Within each development district and consistent with its development program, municipalities are afforded certain powers under the DIF statute, including the power to acquire real property by eminent domain, enter into contracts, receive grants, make relocation payments, lay out roads, and take other actions in furtherance of its development activities. Moreover, municipalities can designate (with the approval of the EACC) a particular development district as an “invested revenue district” and a development program within such district as an “invested revenue district development program”. Municipalities undertaking development programs within an invested revenue district may, but are not limited to, finance such programs by issuing general obligation or revenue bonds which are to be repaid by some or all of the program revenues received by the municipality. The “tax increment” is the property taxes paid upon the “captured assessed value” of the property in the revenue district; *i.e.*, the amount by which the current improved value of an invested revenue district exceeds the “original assessed value” of the district, as defined in 402 CMR 3.03. A municipality can choose to pledge all or a portion of the tax increment (as well as other revenues) towards repayment of the bonds that it issues.

3.03: Definitions

As used in 402 CMR 3.00, the following words shall have the following meanings unless the context clearly requires otherwise:

Affordable Housing. Housing facilities which are affordable to households with incomes at or below 80% of the median income for the area in which the city or town is located as defined by the U.S. Department of Housing and Urban Development and adjusted for household size.

Base Date. The last assessment date of the real property tax immediately preceding the creation of a development district.

Captured Assessed Value. The valuation amount by which the current assessed value of an invested revenue district exceeds the original assessed value of the district.

Development District. A specified area within a city or town that is to be developed by the municipality under a development program, subject to the approval of the EACC under 402 CMR 3.07. A development district may consist of one or more parcels of land, whether or not contiguous, or one or more buildings or structures, whether or not adjacent. The total area of all development districts shall not exceed 25% of the total area of a city or town.

Development Program. A statement of means and objectives adopted by the municipality, and subject to the approval of the EACC under 402 CMR 3.09, that is designed to improve the quality of life, physical facilities and structures, and the quality of pedestrian and vehicular traffic control and transportation within a development district. A development program may also include a statement of means and objectives designed to increase or improve affordable and market rate housing within a development district. A development program submitted to the EACC for approval must contain the information described in 4.02 CMR 3.08.

Financial Plan. A statement of the costs and sources of revenues required to accomplish a development program, including the:

- (a) the cost estimates for the development program;
- (b) the amount of indebtedness to be incurred; and
- (c) sources of anticipated capital.

Inflation Factor. A ratio:

(a) the numerator of which is the total assessed value of all parcels of all residential and commercial real estate that are assessed at full and fair cash value for the current fiscal year minus the new growth adjustments factor for the current fiscal year attributable to the residential and commercial real estate as determined by the commissioner of revenue pursuant to M.G.L. c. 59, § 21C. paragraph (f); and

(b) the denominator of which shall be the total assessed value for the preceding fiscal year of all the parcels included in the numerator. This ratio, however, shall not be less than 1.

Invested Revenue District. A development district, or a portion of a development district, that uses tax increment financing, as defined in 402 CMR 3.03: Development District.

Invested Revenue District Development Program. A development program adopted by the municipality that contains information and statements of intention regarding the municipality's use of tax increment financing to fund the projects in such

development program. An invested revenue district development program submitted to the EACC must contain the specific information described in 402 CMR 3.08(3)(e), as well as the other information described in 402 CMR 3.08, where applicable.

Material Change to a Development District. A change to a development district relating to matters which were required to be, or might properly have been, the subject of a development district application approved locally pursuant to 402 CMR 3.04 and approved by the EACC pursuant to 402 CMR 3.06 and 3.07. Any development district boundary change(s), other than technical corrections, is(are) material.

Material Change to a Development Program. A change to a development program relating to matters which were required to be, or might properly have been, the subject of a development program application approved locally pursuant to 402 CMR 3.04 and approved by the EACC pursuant to 402 CMR 3.08 and 3.09. A material change will vary program by program and should be judged according to the “reasonable person” standard. No changes are permissible which would impair any liability, either current or future, including but not limited to any outstanding indebtedness or other obligations. Any program change(s) that alter(s) the stated public purpose, primary usage, and/or reasonable probability of success is(are) material. Municipalities may further define material change in the development program application with specific criteria, which must be approved by the municipality and the EACC.

Original Assessed Value. The aggregate assessed value of the development district as of the base date, increased each year by a percentage equal to the inflation factor. The original assessed value shall be increased or decreased annually as a result of a change in the tax-exempt status of the property.

Project. A project to be undertaken in accordance with a development program.

Project Costs. Any expenditure made or estimated to be made, or monetary obligations incurred or estimated to be incurred with respect to a project that is part of a development program, including, but not limited to, costs associated with a municipality’s application for approval of a development district or development program, public works costs, acquisition costs, costs associated with the construction or rehabilitation of land or improvements for sale or lease to residential, commercial or industrial users within a development district plus any costs incidental to those improvements. Various types of projects costs are described in M.G.L. c. 40Q, § 1 and M.G.L. c. 40Q, § 2(c). Project costs, however, shall not include the cost of a building or a portion of a building used predominantly for the general conduct of government, such as a city hall, courthouse, jail, police or fire station or other state or local government office buildings.

Project Revenues. Receipts of a city or town with respect to a project including, without limitation, tax increments, investment earnings and proceeds from insurance or the disposition of property.

Public Purpose. Public purpose encourages increased residential, industrial and commercial activity in the Commonwealth.

Tax Increment. The portion of all real and personal property taxes assessed by a city or town upon the captured assessed value of property in a development district.

3.04: Local Approval Process

(1) A municipality shall designate a public or private entity that will be responsible for developing a proposed development district and development program and seeking local approval for such development district and development program.

(2) A municipality shall hold a public hearing on a proposed development district and development program prior to seeking municipal approval of such district and program, and shall also provide the public with an opportunity to submit written comments to the municipality on such district and program. A municipality may hold a single public hearing to simultaneously address a related development district and development program. The municipality shall create a written record of the public hearing, which shall include a description of the testimony offered by persons at such hearing.

(3) A municipality shall provide the public including, but not limited to, the chief elected officers and the chair persons of the legislative bodies of abutting cities and/or towns and the EACC, with reasonable notice of all public hearings and opportunities to provide written comments pertaining to a proposed development district and/or development program. Such notice shall be published in one or more local newspapers of general circulation, shall be posted in the municipality's main governmental building, and shall be sent to any person or group of persons who have requested notification. The notice shall be issued no less than 14 days prior to the public hearing or to the close of the comment period, as applicable. In addition, the information to be submitted to the municipality's governing body pursuant to 402 CMR 3.04(5) and (6) shall be made available to the public upon request prior to any public hearing and comment period.

(4) The municipality must make a reasonable effort to provide all owners of real property that is to be acquired by the municipality as part of a proposed development program with direct written notice of any public hearings and opportunities to provide written comments pertaining to such development program.

(5) When a proposed development district is presented to a municipal governing body for approval, all information identified in 402 CMR 3.06(2)(a)-(j) must be submitted to the governing body as part of such approval process.

(6) When a proposed development program is presented to a municipal governing body for approval, all information identified in 402 CMR 3.08(3) must be submitted to the governing body as part of such approval process.

3.05: General Procedures Governing Filing and Review of DIF Applications

(1) Municipal applications to the EACC for approval of a development district and for approval of a development program within such development district shall be jointly and simultaneously submitted to the EACC. A municipality's governing body, however, may approve a development district and a related development program either simultaneously or at different times.

(2) Applications for approval of a development district and a development program shall be reviewed by the EACC, subject to the following provisions:

(a) The EACC may declare any application to be incomplete and may request that a municipality supplement its application with additional information.

(b) The EACC may request assistance from the Massachusetts Office of Business Development, the Massachusetts Department of Housing and Community Development, or any other state agency or instrumentality in evaluating an application for approval of a development district.

(c) The EACC may request that representatives from a municipality appear before the EACC to present the municipality's application, and to answer questions from the EACC regarding the application.

(d) To the extent necessary and reasonable, the EACC may solicit reports or information from consultants and other third parties in evaluating an application for approval of a development district or development program, and may require the applicant to pay in advance the cost of obtaining such reports or information.

(3) The EACC shall meet to consider completed applications for approval of a development district and development program within 65 days of receiving such applications.

3.06: Applying for Approval of a Development District

(1) A development district designated and approved by a municipality will not become effective unless and until it is approved by the EACC. The EACC shall develop a standard application form for use by municipalities in applying for approval of an area as a development district.

(2) Applications by municipalities for approval of a development district shall contain the following:

(a) Plans or maps of the proposed development district and the immediately surrounding area, showing:

1. Boundaries of the development district and any significant district features that help define the nature and scope of the district which may include, but are not limited to, topographical, natural or environmental (including hazardous environmental) features;

2. Property lines and the foot-print of buildings and parking areas on each existing parcel of land;

3. Existing uses and ownership of each parcel, including identification of land in mixed uses and land in public use;

4. The current zoning of each parcel within the development district; and

5. All existing thoroughfares, public rights of way and easements.

(b) A listing of the assessed value of each parcel of real estate within the district, the most recent annual property tax levy on each such parcel, and any taxes past due and unpaid on each such parcel.

(c) Whether the proposed development district will contain an invested revenue district and, if so, the geographic boundaries of such invested revenue district;

(d) In those instances where the proposed development district will contain an invested revenue development district:

1. A statement identifying parcels, if any, within the invested revenue development district that are subject to a Tax Increment Financing (TIF) agreement pursuant to M.G.L. c. 40, § 59, an Urban Center Housing Tax Increment Financing (UCH-TIF) agreement pursuant to M.G.L. c. 40, § 60, or a special tax assessment pursuant to M.G.L. c. 23A, § 3E(3);

2. For those parcels identified in 402 CMR 3.04(d)(1) that are subject to a TIF agreement or UCH-TIF agreement, a copy of such agreements, as amended; and

3. A statement describing the anticipated impact that the creation of the proposed invested revenue district will have upon any existing TIF or UCH-TIF agreements and upon the ability of the municipality to grant TIF or UCH-TIF agreements in the future, and to take advantage of the Economic Development Incentive Program pursuant to M.G.L. c. 23A, § 3A *et seq.*

(e) A statement describing why the municipality has defined the boundaries of the development district (and any invested revenue development district therein) in the manner that is proposed.

(f) A map of the municipality identifying all existing and proposed development districts within the municipality, and indicating the percentage of the area of the municipality comprised by each such district.

- (g) A certification from the municipality that all development districts, both current and proposed, do not exceed 25% of the total area of the municipality.
- (h) A statement identifying the duration of the proposed development district (not to exceed 30 years) and a name for the proposed development district.
- (i) A certification from the municipality that it has fully complied with the local approval requirements specified in 402 CMR 3.04 with regard to the proposed development district.
- (j) A copy of the written record of the public hearing (relating to the development district) created by the municipality pursuant to 402 CMR 3.04(2), and any written comments that have been provided to the municipality by members of the public concerning the development district.
- (k) A certified copy of a formal, duly enacted order of the city council or town council of a municipality with evidence of approval by the mayor or city manager where such approval is otherwise required by law, or vote of the town meeting of a municipality, whichever is applicable, identifying and approving the proposed development district and identifying the entities and/or individuals who may act on behalf of the municipality in implementing a development program within such district.

3.07: Approval of Proposed Development Districts

- (1) The EACC shall approve a proposed development district if it determines that:
 - (a) The application for such development district is complete;
 - (b) The total area of all development districts within the municipality does not exceed 25%;
 - (c) The municipality has duly approved the development district;
 - (d) Approval of the development district will significantly further the public purpose of encouraging increased residential, industrial and commercial activity in the Commonwealth, as required by M.G.L. c. 40Q, § 2(a); and
 - (e) It is reasonably probable that the municipality will achieve its goals in creating the district.
- (2) If the EACC does not approve a municipality's application for a development district, it shall provide written notice to the municipality and a statement of reasons for denial of the application. A municipality that receives such a denial may subsequently re-apply to the EACC for approval of a development district in accordance with re-application procedures to be developed by the director of the EACC.

3.08: Applying for Approval of a Development Program

- (1) A municipality may not undertake any work in furtherance of a development program, including an invested revenue district development program, unless such

program has been approved by the EACC and is within a development district that has been approved by the EACC. The EACC shall develop a standard application form for use by municipalities in applying for approval of a development program.

(2) Each development district may contain only one development program.

(3) An application for approval of a development program shall contain the following:

- (a) Objectives. A statement of the objectives of the development program.
- (b) Means. A statement describing how these objectives will be achieved through the proposed development program, including:
 - 1. A description of proposed development activities and projects within the designated development district, specifically identifying which activities and projects will be undertaken by public entities and which will be undertaken by private entities;
 - 2. Plans or maps illustrating changes to be made to the development district pursuant to the proposed development program, and specifically identifying:
 - a. Proposed property lines and the foot-print of buildings and parking areas on each parcel within the development district;
 - b. Proposed uses and zoning of all parcels within the development district;
 - c. Proposed thoroughfares, public rights of way and easements;
 - d. Those parcels to be acquired by the municipality; and
 - e. Those parcels to be sold or disposed of by the municipality; and
 - f. Buildings or structures to be demolished, rehabilitated, or constructed.
 - 3. A list of buildings or structures to be constructed or renovated in connection with the development program, with a description of such construction or renovation, including who will be undertaking it.
 - 4. A list of buildings or structures to be demolished, either in whole or in part, in connection with the development program and by whom.
 - 5. A description of how public ways and other infrastructure will be affected by the development program.
 - 6. A description of streetscaping measures if any are to be undertaken within the development district including, but not limited to, coordinated signage, façade and sidewalk improvements, beautification steps, and coordination plans.
 - 7. A description of how transportation facilities and resources will be affected by the development program.

8. A description of provisions if any exist or if any are to be established to govern densities, land coverage, land uses, setbacks, offstreet parking and loading, and building height and bulk.
9. A statement describing how the development program will improve:
 - a. the overall quality of life within the development district;
 - b. the physical facilities and structures within the development district;
 - c. the quality of pedestrian and vehicular traffic control within the development district; and
 - d. the transportation facilities and resources within the development district.
10. An estimate of the number of jobs that will be created, retained, and eliminated as a result of the development program, and the wages and benefits associated with such jobs.

In describing a proposed development program, the municipality shall distinguish between those projects that will be undertaken and paid for by public entities and those projects that will be undertaken and paid for by private entities.

(c) Zoning. A statement describing whether, and to what extent, proposed projects to be undertaken within the development district would be in compliance with existing zoning laws and ordinances. With respect to proposed development that would not be in compliance with existing zoning laws and ordinances, the municipality shall explain how such compliance will be achieved, including a specification of the zoning changes that will be necessary to implement the development program.

(d) Financial Plan. A detailed financial plan, as defined in 402 CMR 3.03. The financial plan must explicitly identify sources of revenue that are sufficient to pay all project costs.

(e) Invested Revenue District Development Program. If the development program includes an invested revenue district development program, a statement containing the following:

1. Estimates of the captured assessed value of the invested revenue district, including projections of original assessed value and projected assessed value after 1 year, 5 years, 10 years, 15 years, 20 years, 25 years, and 30 years, as applicable;
2. The portion of the captured assessed value to be applied to the development program and projected tax increments in each year of the program;
3. The specific projects, either in the invested revenue development district or in the development district as a whole, that will be funded by the tax increments; the timing and amount of such funding through tax increments; and what percentage portion of each project will be funded through tax increments;

4. The method of calculating the tax increments together with any provisions for adjustment of the method of calculation;
 5. A projection of the tax revenues to be derived from the invested revenue district in the absence of a development program;
 6. The board or officer of the city or town responsible for calculating the tax increment;
 7. A description of the bond issuances or other debt obligations contemplated by the municipality in connection with the invested revenue district development program, including the terms and conditions of such issuances or obligations, and whether the bonds issued shall be general or special obligation bonds;
 8. If the municipality intends to issue revenue bonds in support of the invested revenue district development program, a letter from the municipality's financial advisor or underwriter stating that the municipality's financial plan is sound and viable; and
 9. A statement of the estimated impact of tax increment financing on all taxing jurisdictions in which the district is located.
- (f) Housing. A description of plans, if any, for the development of housing, both affordable and market rate, as part of the development program, including the number of housing units that will be created as a result of the program.
- (g) Training. A description of workforce training or workforce development activities, if any is/are, to be undertaken in connection with the development program.
- (h) Municipal Acquisition of Properties. If a municipality intends to acquire property in connection with its development program, a statement identifying:
1. all properties to be acquired by the municipality within the development district;
 2. the mode of acquisition of each property, including whether the property will be acquired by eminent domain, negotiated sale, or other means;
 3. the owner of such properties;
 4. the estimated cost of each property to be acquired and the basis for such estimate (which will be held confidential pursuant to c. 66);
 5. identification of any property to be acquired by the municipality in which any officer or employee of the municipality who, on account of an interest in the acquisition, would be required to make disclosure under c. 268A;
 6. the current and planned use of such properties; and
 7. plans for the relocation of persons displaced by the municipality's acquisition of such properties. Such plans shall conform to all applicable requirements in M.G.L. c. 79A and the regulations and guidelines thereunder.

- (i) Eminent Domain. If a municipality proposes to take property by eminent domain pursuant to M.G.L. chapters 79 or 80A and subject to the confidentiality requirements as set forth in M.G.L. chapter 66, it shall provide a statement as to why the property must be acquired in this manner. A municipality shall not take property by eminent domain unless there shall be a public purpose warranting such taking. The EACC may require, at the expense of the applicant paid for in advance, the written opinion of qualified independent counsel as to whether an application establishes the requisite public purpose.
- (j) Schedule and Duration. A schedule for implementing the development program containing a description of anticipated events during each of the first five years of the development program, and for each five-year period thereafter, and a statement identifying the duration of the development program. A development program may not exceed 30 years from the date of the approval of the development district by the EACC.
- (k) Interested Parties. The names and addresses of persons or entities that may have a direct interest in whether the proposed development program is approved by the EACC. If it is not practicable for the applicant to name these persons or entities individually, the municipality may refer to groups of persons or entities, provided that this is accomplished with a reasonable degree of specificity.
- (l) Name. A name for the development program.
- (m) Local Approval Requirements.
1. A certification from the municipality that it has fully complied with the local approval requirements specified in 402 CMR 3.04 with respect to the development program;
 2. A copy of the record of the public hearing (relating to the development program) created by the municipality pursuant to 402 CMR 3.04(2) and any written comments that have been provided to the municipality by members of the public concerning the development program;
 3. A description of expected public participation during the execution of the development program; and
 4. A certified copy of a formal, duly enacted order of the city council or town council of a municipality with evidence of approval by the mayor or city manager where such approval is otherwise required by law, or vote of the town meeting of a municipality, whichever is applicable, identifying and approving the proposed development program and identifying the entities and/or individuals who may act on behalf of the municipality in implementing the development program.
- (n) Material Change Criteria. Municipalities choosing to further define material change shall propose the definition at the time of application.

3.09: Approval of Proposed Development Programs

(1) The EACC shall approve a proposed development program if it determines that:

- (a) The application for such development program is complete;
- (b) The development program is to be undertaken within a development district approved by the municipality and by the EACC;
- (c) The development program has been duly approved by the municipality;
- (d) The municipality has, in accordance with M.G.L. c. 40Q, § 1, presented satisfactory assurances and evidence to the EACC that the development program will improve the quality of life, the physical facilities and structures, and the quality of pedestrian and vehicular traffic control and transportation within a development district;
- (e) Approval of the development program will further the public purpose of encouraging increased residential, industrial and commercial activity in the Commonwealth, as required by M.G.L. c. 40Q, § 2(a); and
- (f) There is a reasonable probability that the municipality's financial plan, development strategies, and other project plans will allow it to achieve the stated goals of the development program.

(2) If the EACC does not approve a municipality's application for a development program, it shall provide written notice to the municipality and a statement of reasons for denial of the application. A municipality that receives such a denial may subsequently re-apply to the EACC for approval of a development program in accordance with re-application procedures to be developed by the director of the EACC.

3.10: Amendments to Development Districts and Development Programs

(1) A municipality shall only make a material change(s) or amendment(s) to an approved development district or development program by complying with the local approval process specified in 402 CMR 3.04, as applicable for this change or amendment, and by receiving final approval from the EACC specified in 402 CMR 3.07 and 402 CMR 3.09, as applicable for this change or amendment.

Municipalities seeking to make a change(s) or amendment(s) to an approved development district or development program may obtain a determination from the EACC that such a change or amendment is or is not material. The EACC will respond within 30 days of receipt of a written request for clarification.

Municipalities shall send notice of any change(s) or amendment(s) to an approved development district or development program to the EACC. These changes are subject to EACC review for materiality. If the EACC deems such change(s) or amendment(s) to be material and has not been asked to approve it/them, the municipality shall be subject to Section 3.14, Noncompliance by Municipality.

(2) The EACC will create a standard form to be used by municipalities in seeking EACC approval of an amendment to a development district or development program.

(3) Applications for approval of an amendment to a development district or development program must, in addition to any other information required by the EACC, contain the following:

- (a) A detailed description of the proposed amendment;
- (b) The reason(s) for the amendment;
- (c) The costs of the amendment, if any, and the method of financing such costs;
- (d) The effect of the amendment on project activities;
- (e) The impact of the amendment on any program of tax increment financing implemented by the municipality;
- (f) A certification from the municipality that it has complied with the local approval requirements specified in 402 CMR 3.04, as applicable, with respect to the proposed amendment;
- (g) A copy of the record of the public hearing (relating to the amendment) created by the municipality pursuant to 402 CMR 3.04(2) and any written comments that have been provided to the municipality by members of the public concerning the amendment; and
- (h) A certified copy of a formal, duly enacted order of the city council or town council of a municipality with evidence of approval by the mayor or city manager where such approval is otherwise required by law, or vote of the town meeting of a municipality, whichever is applicable, identifying and approving the proposed amendment.

(4) The EACC will review and, where appropriate, approve such proposed amendments in accordance with the procedures and criteria stated in 402 CMR 3.07 and 3.09, to the extent applicable.

3.11: Written and Oral Comments from Interested Parties

The EACC shall establish a procedure for accepting the submission of comments by interested parties on a proposed development district or development program. In addition, pursuant to M.G.L. c. 23A, the EACC may schedule one or more hearings to provide interested parties with an opportunity to be heard on a proposed development district or development program.

3.12: Status Reports

Each municipality implementing an approved development program shall provide an annual status report to the EACC describing all significant activities, projects and events during the preceding year in furtherance of the program, including but not limited to, a list of properties acquired by the municipality by eminent domain during the preceding year, an update on the costs and financing of the program, including the

status of tax increment financing for the program, and a schedule for the program containing a description of anticipated events during each of the next five years, and for each five-year period thereafter. Such reports shall be submitted on or before each anniversary of the development program's approval by the EACC. In addition, the EACC may, from time to time, request other information from municipalities implementing approved development programs, and such municipalities shall respond to such inquiries as directed by the EACC.

3.13: Public Participation During Implementation of Development Program

The EACC may issue guidelines or directives requiring a municipality that is implementing a development program to provide for public participation in the implementation process. Such guidelines or directives may, for example, require a municipality to issue periodic public notices or hold periodic public meetings or hearings.

3.14: Noncompliance By Municipality

(1) Following the EACC's approval of a development district and development program, the EACC shall have the continuing authority to monitor and enforce a municipality's compliance with representations made by the municipality in its development district and development program applications, as well as its compliance generally with 402 CMR 3.00 and M.G.L. c. 40Q. In particular, the EACC may take appropriate remedial actions where a municipality has:

- (a) Undertaken or demonstrated an intention to undertake a material change to a development district or development program previously approved by the EACC without obtaining EACC approval of such change through the amendment process described in 402 CMR 3.09;
- (b) Has failed to comply with the requirements of 402 CMR 3.12 after receiving initial written notice of such non-compliance and an opportunity to cure such non-compliance; or
- (c) Has otherwise contravened the requirements of 402 CMR 3.00 or M.G.L. c. 40Q;

(2) Such remedial actions may include, but are not limited to:

- (a) Revoking the approval, or suspending the implementation, of a development program, except where such program involves bond financing, commercial lending or other development financing;
- (b) The issuance of an order by the EACC directing the municipality to adhere to an approved development district and/or development program or to comply with 402 CMR 3.00 and/or M.G.L. c. 40Q, and the referral of such order to the Office of the Massachusetts Attorney General for enforcement, if necessary;
- (c) Declining to approve any further amendments to a development district or development program proposed by that municipality; and

- (d) Declining to approve subsequent applications by that municipality for approval of a development district or development program.

3.15: Municipal Recordkeeping

All documents directly related to the EACC's approval and oversight of a development district or development program shall be maintained and kept for a period of seven (7) years following the expiration of such development district and development program or three (3) years following the date of final resolution of all legal claims relating to the development district or development program, whichever is longer. Such documents shall include, but not necessarily be limited to, the following:

- (1) Applications for approval of a development district or development program;
- (2) Requests for amendments to an existing development district or development program;
- (3) Status reports and other information submitted to the EACC pursuant to 402 CMR 3.12; and
- (4) Orders or resolutions from municipal governing councils or boards pertaining to a development program or development district.

3.16: Technical Assistance

Municipalities may request assistance from the EACC concerning the establishment and the implementation of prospective or current development districts or programs. Subject to available resources, the EACC, or its staff, may provide such assistance in conjunction with the Massachusetts Office of Business Development and the Massachusetts Department of Housing and Community Development.

3.17: Miscellaneous

- (1) The EACC shall seek to revise and amend its procedures and 402 CMR 3.00 from time to time to reflect changed circumstances and its experiences in program implementation.
- (2) The provisions of 402 CMR 3.00 are severable, and if any of the provisions herein are held by a court of competent jurisdiction to be contrary to law, such decision shall not impair any of the remaining provisions

3.18: Emergency Waiver

The EACC may waive any provision in 402 CMR 3.00 if it determines that such action is necessary and appropriate to further the goals of the DIF Program or is in the public interest; provided, however, that:

- (1) Such waiver is accomplished by a vote of the EACC;

- (2) The EACC issues a written statement of its reasons for such waiver; and
- (3) The EACC may not waive any requirements or criteria that are mandated by any general or special law.

REGULATORY AUTHORITY

402 CMR 3.00: M.G.L. c. 40Q

■ Appendix D

MEMORANDUM

To: Ron Headrick, Vollmer Associates
From: Steve Heikin
Subj: Inner Belt Park Access Study
Comments on Tech Memo #2
Date: August 24, 2004

General Comments:

- Broad range of concepts and access from various points good – especially the connection to Rutherford Ave. – though this looks like an expensive proposition, with a 1000 foot depressed section.
- A regional location map would be useful – for instance, showing “regional connection from the Assembly Square area through Inner Belt to the college area.”
- Check scales on drawings.
- The memo doesn’t acknowledge issues related to extension of Green Line (McGrath concepts) -- now under study -- or possible reconstruction of McGrath Highway pending outcome of current Corridor Planning Study.
- Many access issues (as in NW2) could be resolved by relocating New Hampshire division to old alignment and putting it below “Brickbottom Boulevard” – then the issues of crossing the embankment to re-link Inner Belt Road to New Washington Street and Washington Street go away.

Specific Comments:

IB2 – How is it linked back to Inner Belt Road – through extensions of New Washington and Third Avenue? Is there a way to extend IB2 all the way to Washington Street as an alternative to extending NW2 to Rutherford Avenue? This looks like it would involve a partial taking of the building closest to I-93 but would avoid creating a 1000 foot depressed section under the multiple rail rights of way as suggested in NW1 Part 2. It would also create a way of drawing truck traffic off Washington Avenue just past the I-93 overpass, before the beginning of residential uses on the north side of the street. This idea is actually included within the B1 Concepts, which continue the connection all the way to Assembly Square Drive – though with an underpass at Washington Street rather than an intersection. Are traffic operations on Washington Ave. bad enough to justify the connection to Rutherford Avenue (or this suggested alternative)?

NW1 – are modifications involving takings at west end of New Washington necessary?

- Re 40 scale plans (Sheet 1): Northernmost connection between Inner Belt Road and Concept I2 ROW (with an existing road already in place) seems to involve a partial taking -- is this necessary?

NW2 – Extensive overpass requirements to extend and link Inner Belt Road to New Washington. This would be greatly facilitated if the New Hampshire division is returned to its original alignment; even more so if this were in a depressed section.

- Re the note on the NW2 drawing “Relocate and Depress Lowell Line” – I agree that this is worth considering, but think more would be gained – as suggested elsewhere – by putting it back in its original alignment between Inner Belt Road and Chestnut/Joy Streets.

M1 – This and other McGrath Highway connection concepts don’t mention the proposed Green Line extension, which would likely be elevated – or descending from an elevated section – in this area. How does this affect the proposed viaduct section? This issue notwithstanding, the direct link (“alternative alignment”) from the southern end of Inner Belt Road (at the current “hairpin” turn) is obviously a preferable connection. Even better is M2, which swings the connection over to Rufo Road, where there is already a traffic signal and the entry to the Twin Cities Plaza.

- The **critical opportunity** here is to make (or evaluate) the case for **depressing** the Fitchburg line, instead of **raising** it several feet as the T apparently intends to do to resolve some local flooding issues. This opens up the whole array of opportunities, from creating a simple at-grade connection between Inner Belt Road and McGrath Highway, to removing the McGrath Highway viaduct and rebuilding the roadway as a surface boulevard, to opening the possibility of creating a northern equivalent of Back Bay Station by bringing the Fitchburg and Lowell lines back together. It is critical to consider the smart-growth, transit-related economic development opportunities that are possible here, not just the infrastructure costs involved.

M2 – The connection to McGrath Highway at Rufo Road -- already signalized – is preferable to the connection opposite Sciarappa Street. Could the alignment be moved east at the McGrath highway intersection to avoid taking the property on the west side of the proposed alignment? Including the connection to the southern extension of the I2 route is interesting, but requires additional takings.

M3 – This concept may make some sense in reducing the slope of a potential viaduct, but it doesn’t recognize the Green Line extension. Proximity to Brickbottom Artists Lofts could be a problem – residents here are the primary “sensitive receptors” of any noise impacts that might be created by a new roadway through this area. Also, tying into the elevated portion of the McGrath Highway viaduct suggests giving up on the notion that the viaduct could be removed.

M4 – A realigned at-grade McGrath Highway – in effect along the alignment of the existing Linwood Street – is similar in concept to the proposed “Brickbottom Boulevard” suggested in the ICON North Point study. I don’t know if it’s preferable to a rebuilt at-grade McGrath Highway in its existing alignment, but it would help to facilitate development of the “invisible” parcels adjacent to the current viaduct. Within the Inner Belt district, the continuation of Somerville Avenue could swing into the alignment of an improved Second Street – perhaps a more feasible near-term alternative than the diagonal slice through the Inner Belt.

C1 – BRT Link – Since this viaduct is planned to be constructed as part of the Urban Ring, its potential should be evaluated further. The North Point Study suggests expanding this concept from a sole-use busway into a boulevard or pair of roadways supporting an estimated 9 acres of adjacent air-rights development in Somerville above the MBTA tracks. This would create a secondary transportation link between the Charlestown Bridge and Washington Street, linking up with a possible Brickbottom Boulevard, while the development parcels would complement the

North Point development. While the active tracks present a coordination issue, they do run parallel to the proposed BRT alignment and potential air-rights parcels, making structural support reasonably straightforward. This concept is also mirrored in the “Bypass Alternative” scenario of the Rutherford Avenue Corridor Transportation Study – also proposed to be connected directly to the Charlestown Bridge.

B1 and B2 – Between these two options, B2, which makes Broadway two ways from Sullivan Square, seems the better choice. It is not clear, however, whether the mix of uses being developed at Assembly Square and those uses which might be developed in the Inner Belt would justify the B1 or B2 connection. It seems more important to create the link into the Kendall Square/East Cambridge area, where easy access to the burgeoning development of biotech facilities could spur similar growth in the Inner Belt with its large parcels of underdeveloped land.

R1 – The feasibility of this connection seems related to the likelihood of the development of the Rutherford Avenue Bypass Alternative. The proposed link between Rutherford Avenue and the bypass constitutes much of this option. However, the cost and value of this option should be compared to an extension of the IB2 option to Washington Street with a new intersection at Washington – which might require some takings but not a major underpass.

Strategic Planning

Tech Memo 2 suggests evaluating the amount of traffic volume growth that would be accommodated by the various transportation options and calibrating allowable development to this level. It might be preferable to evaluate the development potential of the Inner Belt and then identify the transportation improvements that would best facilitate that growth.

As the North Point Somerville study suggests, the amount of development potential is enormous – quite likely comparable in scale to the \$2 billion in development currently envisioned at North Point – 90% of which is in Cambridge.

The North Point Somerville study points out that the Inner Belt district and the adjacent McGrath Highway corridor together amount to some 135 acres – three times the size of the North Point development site. Redevelopment of only one-third of the highly underutilized area would create a transportation-oriented smart growth opportunity equivalent to that of North Point. Possible air-rights development along the north edge of North Point – in Somerville – along the proposed BRT viaduct amounts to another 9 acres.

Conclusion: A Broader Perspective on Transportation Improvements

Finally, the review of access and transportation improvements should not be limited to just highway improvements. This study area is at the center of a number of other planned and potential transportation improvements that could have a transformative effect on regional smart growth development opportunities. These include:

- The proposed extension of the Green Line – linked to the development of North Point and now under study by the MBTA (and which is insufficiently acknowledged in Tech Memo 2).
- Major improvements to or reconstruction of the McGrath Highway – now under study by CTPS in the Route 28 Corridor Planning Study.

- Depressing the Fitchburg Line, which would facilitate the critical vehicular link between the Inner Belt and East Cambridge, and allow reconstruction of McGrath Highway as an at-grade boulevard.
- Returning the Lowell Line to its original right-of-way, which would remove the east-west railroad embankment which divides the Inner Belt. Depressing the Lowell Line along with the Fitchburg Line would create the possibility of a Brickbottom Transportation Terminal at the center of the development zone where North Point, the Inner Belt, and the McGrath Corridor come together. The extended Green line could run atop this right of way, in the median of the proposed Brickbottom Boulevard.
- The various stages of the Urban Ring, including the interim BRT link between the Charlestown Bridge and McGrath Highway, which could become a full use link and facilitate adjacent air rights development; and the final phase deep tunnel, which could link up with the proposed Brickbottom Transportation Terminal.

■ Appendix E



Application for the Massachusetts District Improvement Financing Program

Background, Overview and Application Massachusetts District Improvement Financing (DIF) Program

Massachusetts General Law Chapter 40Q, the District Improvement Financing (DIF) Program, became effective in August of 2003. The associated regulations, CMR 402 3.00, were approved in July of 2004. DIF provides municipalities with a new economic development tool for funding public purpose projects. The DIF Program includes two major components: 1) definition and establishment of a District; and, 2) development and documentation of an action plan called a Program. The Massachusetts Office of Business Development (MOBD) manages DIF on behalf of the Economic Assistance Coordinating Council (EACC). Final, concurrent approval of both the District and Program is required from the EACC prior to program implementation.

This Application has six sections: 1) Cover Sheet, 2) General Information, 3) District Information, 4) Program Information, 5) IRD and IRDDP Information, and 6) Private Partner Information. It also specifies the attachments or enclosures in each of these sections.

The District, Program, IRD and IRDDP sections of this Application are deliberately redundant in order to ensure a complete submission utilizing one application. Information need only be provided once and should be provided where most logical. Similarly, if the District and Program (and IRD and IRDDP) have been approved concurrently, it is acceptable to provide all related local approval information once. However, please make it clear to the EACC where they will find information via the index or in the Application itself to facilitate review. If a section or requirement within a subsection is not applicable, simply note it as such in the check boxes provided. If the "Not Applicable" option is not provided, the section must be completed in order for the Application to be considered complete. If the Applicant is unable to provide any of the requested information, then the justification must be documented and submitted along with the Application.

When the Application is considered complete by MOBD, it will be submitted to the EACC for consideration at its next meeting. The Applicant will be informed of the status and next scheduled meeting.

All information required in the Application shall be forwarded to:

Patricia E. Singer, EACC Project Director
Massachusetts Office of Business Development
10 Park Plaza, Suite 3730
Boston, MA 02116



Application for the Massachusetts District Improvement Financing Program

Section 1
District Improvement Financing Application Cover Sheet

1. Applicant Information

Applying City or Town (the Municipality or Applicant): _____

Applying Entity (if not the City or Town): _____

Primary Contact Person: _____

Title: _____

Address: _____

Phone Number: _____

Fax Number: _____

E-mail address: _____

2. Application Information

District Name: _____ Duration: _____ Years

Program Name: _____ Duration: _____ Years

IRD Name: _____ Duration: _____ Years

IRDDP Name: _____ Duration: _____ Years

3. Assessed Value Information

Certified, Original Base Assessed Value in the District: \$ _____

Certified, Original Base Assessed Value in the IRD: \$ _____



Section 2 General Information

1. Index for the Application

☐ Enclosed

The index will specify the location of each element of the application. Using a 3-ring binder to accumulate information under each section and subsection is strongly recommended for ease of indexing and reviewing.

2. Contact Summary Sheet

☐ Enclosed

The Contact Summary Sheet identifies the public and private parties involved in the District, the Program and, if applicable, the IRD and IRDDP.

3. Municipal Description

☐ Enclosed

A general description of the Municipality. The intent is to familiarize the EACC with your community so that they have a context in which to understand the Application. A recent or updated copy of a rating agency general obligation bond report could complete this subsection.

4. Municipal Certification

☐ Enclosed

A copy of the Municipal certification affirming that all of the DIF districts within the Municipality do not together comprise more than 25% of the total area of the Municipality along with a map showing all existing and proposed districts and their percent of the area of the Municipality.

5. Consultants' Reports

☐ Enclosed (If any, itemize below)

☐ N/A

- a) _____
- b) _____
- c) _____
- d) _____

6. Other Useful Information

☐ Enclosed (If any, describe below)

☐ N/A

- a) _____
- b) _____
- c) _____
- d) _____



Section 3

District Information

1. District Description

☐ Enclosed

A description of the District which must include its name, proposed duration and a general description of the District. The intent is to identify and familiarize EACC with the District and provide the background necessary to support a statement explaining why the Municipality has defined the District boundaries as proposed.

2. Objectives / Goals (District)

☐ Enclosed

A description of the Applicant's objective or goal in creating the District. This subsection should include information which the Applicant believes will be helpful to the EACC in arriving at its conclusion that it is reasonably probable that the Applicant will achieve its goals in creating the District.

3. Public Notice (District)

☐ Enclosed

Documentation of the public notice procedures used during the District approval process. Include a copy of the notice and a copy of the mailing or distribution list. In addition to the general notice, notice must be given to taxpayers located in the District, the chief elected officers and the chairpersons of the legislative bodies of abutting cities and / or towns, and the EACC. The public may also include underlying and overlapping governmental entities, the Applicant's own planning department and conservation commission, and any other parties the Applicant considers important to the reasonably probable success of the DIF program. A transparent and all inclusive process is the end goal.

4. Written Record of Public Hearing (District)

☐ Applicable

A copy of the written record of the public hearings relating to the District and any written comments that have been provided to the Applicant by members of the public concerning the District. The Applicant may provide a summary to facilitate the EACC's review but is not required to do so.

5. Certification of Compliance with the Local Approval Requirements (District)

☐ Applicable

A certificate from the Municipality stating that it has fully complied with the local approval requirements specified in 402 CMR 3.00, Section 3.04 with regard to the proposed District. These include:

- a) Designation or creation of an entity that will be responsible for the District*
- b) A public hearing prior to adoption of the District and a written record of such hearing*
- c) Notice to the public of the public hearing and the opportunity to comment in writing on the proposed District*
- d) Evidence that all information required in 402 CMR 3.06(a-j) {and, if the Program was approved concurrently, Section 3.08(3) regarding the Program} have been provided to the municipal governing body prior to its approval of the District {and Program}.*



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6. Approving Order (District)

☐ Enclosed

A certified copy of a formal, duly enacted order of the city or town council of the Applicant (with evidence of approval by the mayor or city manager where such approval is required by law) or vote of the town meeting of the Municipality, whichever is applicable, identifying and approving the proposed District. In addition, include the following:

- a) The entities and / or individuals (including their titles, qualifications and contact information, if not already identified on the contact sheet) who may act on behalf of the Municipality in implementing the Program within such District*
- b) Describe where policy control rests, whether staff is dedicated or shared and their respective powers*
- c) Itemize administrative costs and provision for payment of administrative expenses*
- d) Any other information which is necessary to understand the administration and operations of the District.*

7. Maps (District)

☐ Enclosed

Maps and / or plans of the proposed District and the surrounding area showing:

- a) District boundaries*
- b) Any significant District features that help define the nature and scope of the District which may include topographical, natural or hazardous environmental features*
- c) Property lines, building foot prints and parking areas*
- d) Existing uses and ownership of each parcel (Identify land in mixed use and public land)*
- e) Current zoning*
- f) All thoroughfares, public rights of way and easements.*

8. Assessed Value (AV) Information

☐ Enclosed

AV information including, but not limited to:

- a) A copy of the Assessor's certification of the original, base AV of the taxable real and personal property within the District*
- b) The AV of each parcel of real estate within the District*
- c) The most recent annual property tax levy on each parcel within the District*
- d) Past due taxes as well as any significant* historic delinquencies for each parcel*
- e) Any pending appeals or significant* historic appeals for each parcel*
- f) Any significant* personal property or concentrations in personal property*
- g) Any District major taxpayers and their percent of the District's AV*

**Note: "Significant" should be defined in the context of current character of the District as well as in its improved, future nature. In any event, a delinquency or concentration equal to or over 5% should be reported. Consideration of the previous 5 years is sufficient for historic reporting.*

9. IRD Information (if applicable)

☐ Enclosed

☐ N/A

☐ See Section 4, subsection 1

- a) A statement identifying parcels, if any, within the IRD that are subject to a Tax Increment Financing (TIF – EDIP Program) agreement, an Urban Center Housing Tax Increment Financing (UCH-TIF) agreement or a special tax assessment pursuant to M.G.L. c. 23A, § 3E(3)*
- b) A copy of the TIF or UCH-TIF agreements impacting parcels in the IRD*
- c) A statement describing the impact of this IRD on existing and future economic development agreements including the Economic Development Incentive Program.*



Section 4 Approval of a Development Program

In describing a proposed program, the Applicant must distinguish between those projects that will be undertaken and paid for by public entities and those that will be undertaken and paid for by private entities.

1. Objectives / Goals (Program)

☐ Applicable

Provide a description of the Applicant's objective or goal in creating the Program and an explanation of how the Municipality will benefit from the implementation of the Program. This subsection should include information which the Applicant deems helpful to the EACC in arriving at its conclusion that it is reasonably probable that the Applicant will achieve its goals in creating the Program.

2. Written Record of Public Hearing (Program)

☐ Enclosed

A copy of the record of the public hearing relating to the Program and any written comments that have been provided to the Applicant by members of the public concerning the Program. The Applicant may provide a summary to facilitate the EACC's review but is not required to do so.

3. Certification of Compliance with the Local Approval Requirements (Program)

☐ Enclosed

A certification from the Municipality that it has fully complied with the local approval requirements specified in 402 CMR 3.04 with respect to the Program. These include:

- a) Designation of an entity that will be responsible for the Program*
- b) A public hearing prior to adoption of the Program and written record of such hearing*
- c) Notice to the public of the public hearing and the opportunity to comment in writing on the proposed Program*
- d) Reasonable effort to provide direct written notice to all owners of real property to be acquired by the municipality as part of the proposed Program of public hearings and providing the opportunity to comment in writing on the Program*
- e) Evidence that all information required in 402 CMR 3.08(3) had been provided to the municipal governing body prior to its approval of the Program.*

4. Approving Order (Program)

☐ Enclosed

A certified copy of a formal, duly enacted order of the city or town council of the Applicant (with evidence of approval by the mayor or city manager where such approval is required by law) or vote of the town meeting of the Municipality, whichever is applicable, identifying and approving the proposed Program. Such order must include a name for the Program. If different from the District, describe where policy control rests, whether staff is dedicated or shared, their respective powers, administrative costs, and provision for payment of administrative costs. Please provide any other information that is necessary to understand the administration, implementation and execution of the Program.

5. Goal Attainment (Program)

☐ Enclosed

Description of how the Applicant expects to achieve its objectives through the Program. This subsection should include:

- a) A description of proposed development activities and projects within the District and under the Program. Specifically, identify which activities and projects will be undertaken by public entities and which will be undertaken by private entities.*



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- b) *Plans or maps illustrating changes to be made to the District pursuant to the proposed Program and identifying:*
 - (1) *Proposed property lines and the foot-print of buildings and parking areas on each parcel within the District*
 - (2) *Proposed uses and zoning of all parcels*
 - (3) *Proposed thoroughfares, public rights of way and easements*
 - (4) *Those parcels to be acquired by the Municipality (if any)*
 - (5) *Those parcels to be sold or disposed of by the Municipality (if any)*
 - (6) *Buildings or structures to be demolished rehabilitated or constructed (if any).*
- c) *A list of buildings or structures to be constructed or renovated in connection with the Program, with a description of such construction or renovation, including who will be undertaking it. If none, indicate same.*
- d) *A list of buildings or structures to be demolished, either in whole or in part, in connection with the Program and by whom. If none, indicate same.*
- e) *A description of how public ways and other infrastructure will be affected. If none will be affected, indicate so.*
- f) *A description of streetscaping measures that are to be undertaken under the Program including, but not limited to, coordinated signage, façade and sidewalk improvements, beautification steps, and coordination plans. If none, indicate same.*
- g) *A description of how transportation facilities and resources will be affected. If none, indicate same.*
- h) *A description of provisions which exist or which will be established to govern densities, land coverage, land uses, setbacks, off-street parking and loading, and building height and bulk.*
- i) *A statement describing how the Program will improve:*
 - (1) *The overall quality of life within the District*
 - (2) *The physical facilities and structures within the District*
 - (3) *The quality of pedestrian and vehicular traffic control within the District*
 - (4) *The transportation facilities and resources within the District.*
- j) *An estimate of the number of jobs that will be created, retained and eliminated as a result of the Program, and the wages and benefits associated with such jobs. If no impact, indicate none.*
- k) *A statement describing whether, and to what extent, proposed projects to be undertaken within the District would be in compliance with existing zoning laws and ordinances. With respect to proposed development that would not be in compliance with existing zoning laws and ordinances, the Applicant should explain how such compliance will be achieved, including a specification of the zoning changes that will be necessary prior to implementation.*
- l) *A detailed financial plan. The financial plan must explicitly identify sources of revenue that are sufficient to pay all project costs and demonstrate that, under various scenarios, there is a reasonable probability that the Applicant will achieve its goals in creating the District and Program. The plan should include the following (as applicable):*
 - (1) *Estimates of the captured assessed values including the original, certified assessed value and projected assessed values after 1 year, 5 years, 10 years, 15 years, 20 years, 25 years, and 30 years, as applicable. Provide underlying assumptions*
 - (2) *The portion of the captured assessed value to be applied to the Program and projected tax increments in each year of the Program. Provide underlying assumptions*
 - (3) *Describe the method of calculating tax increments together with any provisions for adjustment to the method of calculation*
 - (4) *Provide a projection of the tax revenues to be derived in the absence of the Program*
 - (5) *Identify specific projects that will be funded by the tax increments, the timing and amount of such funding through tax increments, and what percentage portion of each project will be funded through tax increments*
 - (6) *The board or officer of the city or town responsible for calculating the tax increment.*
 - (7) *Allocation, if any, of excess incremental revenue(s) which accrues in any year.*
- m) *If a municipality intends to acquire property in connection with its Program, a statement identifying:*



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- (1) *All properties to be acquired by the Municipality within the District*
 - (2) *The method of acquisition of each property, including whether the property will be acquired by eminent domain, negotiated sale, or other means*
 - (3) *The owner of such properties*
 - (4) *The estimated cost of property to be acquired and the basis for such estimate*
 - (5) *Identification of any property to be acquired by the Municipality in which any officer or employee of the Municipality who, on account of an interest in the acquisition, would be required to make disclosure under chapter 268A*
 - (6) *The current and planned use of properties to be acquired*
 - (7) *Plans for the relocation of persons displaced by the Municipality's acquisition of such properties. Such plans shall conform to all applicable requirements in M.G.L. c. 79A and 80, the regulations and guidelines there under.*
- n) *If the Applicant proposes to take property by eminent domain, it must provide a statement as to why the property will be acquired in this manner. The Applicant may not take property by eminent domain unless there is a public purpose warranting such taking. The EACC may require, at the expense of the Applicant paid for in advance, the written opinion of qualified independent counsel as to whether the Application establishes the requisite public purpose.*
 - o) *A description of plans, if any, for the development of housing (both affordable and market rate) as part of the Program. Include the number of housing units that will be retained, renovated and / or created as a result of the Program.*
 - p) *A description of workforce training or workforce development activities, if any, to be undertaken in connection with the Program.*
 - q) *A schedule for implementing the Program containing a description of anticipated events during each of the first 5 years of the Program, and for each five-year period thereafter, and a statement identifying the duration of the Program.*
 - r) *The names and addresses of persons or entities that may have a direct interest in whether the proposed Program is approved by the EACC. If it is not practicable for the Applicant to name these persons or entities individually, the municipality may refer to groups of persons or entities, provided that this is accomplished with a reasonable degree of specificity.*

6. Execution (Program)

☐ Enclosed

☐ N/A

A description of expected public participation during the execution of the Program. Include disclosure of competitive bidding, fair wage or other similar requirements.



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Section 5 IRD Description

Does the Program include an IRD and IRDDP?

☐ Yes – Continue with this Section

☐ No (Go to Section 6, below)

1. Description (To be provided if the IRD is not coterminous with the District):

☐ Enclosed – Not Coterminous ☐ Coterminous

*If the IRD is **not** coterminous with the District, provide:*

- a) *A map showing the IRD boundaries and its relative size to the District and Municipality*
- b) *Note any significant IRD features*
- c) *Describe the IRD. The IRDDP description should be sufficiently detailed to enable the reader to understand the IRD's growth potential. It must include major taxpayers and employer information.*

2. Municipal Order (IRD and IRDDP)

☐ Enclosed

☐ See Section 4, subsection 4

A certified copy of the Municipal order identifying and approving the proposed IRD and IRDDP.

3. Project Description (IRD and IRDDP)

☐ Enclosed

A thorough and complete description of the project.

4. Zoning (IRD and IRDDP)

☐ Enclosed

☐ N/A

Disclose any approved, pending or proposed zoning changes.

5. Property Acquisition (IRD and IRDDP)

☐ Enclosed

☐ N/A

Information regarding municipal acquisition of property including via eminent domain proceedings and/or relocation plans for persons, businesses or organizations.

6. Financial Plan (IRD and IRDDP)

☐ Enclosed

A copy of the financial plan associated with the Application. Such plan should demonstrate that, under various scenarios, there is a reasonable probability that the Applicant will achieve its goals in creating the IRD and IRDDP. Such plan should include at least the following:

- a) *Estimates of the captured assessed value of the IRD, including the original, certified assessed value and projected assessed values after 1 year, 5 years, 10 years, 15 years, 20 years, 25 years, and 30 years, as applicable. Provide underlying assumptions*
- b) *The portion of the captured assessed value to be applied to the IRDDP and projected tax increments in each year of the IRDDP. Provide underlying assumptions*
- c) *Describe the method of calculating tax increments together with any provisions for adjustment to the method of calculation*
- d) *Provide a projection of the tax revenues to be derived from the IRD in the absence of the Program*
- e) *List the specific projects in the IRD that will be funded by the tax increments; the timing and amount of such funding through tax increments; and what percentage portion of each project will be funded through tax increments*
- f) *Name the board or officer of the city or town responsible for calculating the tax increment*



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- g) *Describe the bond issuance(s) or other debt obligation(s) contemplated by the Applicant in connection with the IRDDP, including the terms and conditions of such issuances or obligations, and whether the bonds issued shall be general, revenue or special obligation bonds. If the Municipality intends to issue revenue bonds in support of the IRDDP, include a letter from the Municipality's financial advisor or underwriter stating that the Municipality's financial plan is sound and viable*
- h) *Allocation of excess incremental revenue(s), if any, which accrues in any year.*

7. Impact Statement (IRD and IRDDP)

☐ Enclosed

A statement of the estimated impact of tax increment financing on all taxing jurisdictions in which the District is located.



Section 6 Private Partner Information

Section 6 is intended to identify and describe private partners (i.e., retail, commercial and industrial partners including developers and master developers) and their roles in accomplishing the Program or IRDDP's goals and objectives. This section must be completed for each private partner. While important to the overall success of the Program, this information need not be completed for Counsel, Bankers, etc.

Are you working with a significant private partner(s)?

☐ Yes – Continue with this Section ☐ No – Application end

1. Person completing this Section for the Private Partner

Name: _____
Title: _____
Business Name: _____
Address: _____
Fax Number: _____
Phone Number: _____
E-mail address: _____

2. Person Who Can Answer Questions Regarding this Section

Name: _____
Title: _____
Business Name: _____
Address: _____
Fax Number: _____
Phone Number: _____
E-mail address: _____

3. Counsel – Person who is providing legal counsel to the Private Partner

Name: _____
Title: _____
Business Name: _____
Address: _____
Fax Number: _____
Phone Number: _____
E-mail address: _____

4. Authorized Signatory for the Private Partner

Name: _____
Title: _____
Business Name: _____
Address: _____
Fax Number: _____
Phone Number: _____
E-mail address: _____



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5. Relationship Bank for the Private Partner

Name: _____
Title: _____
Business Name: _____
Address: _____
Fax Number: _____
Phone Number: _____
E-mail address: _____

6. Investment Bank (Private Partner who provides equity or handles bond sale – complete for both)

Name: _____
Title: _____
Business Name: _____
Address: _____
Fax Number: _____
Phone Number: _____

7. Corporate Information for the Private Partner

☐ Enclosed

a) *Corporate Structure*

☐ *Sole proprietorship*

☐ *Partnership - If the Private Partner is a partnership, please provide sufficient information to describe the partnership including, but not limited to: its state of organization; date of partnership agreement; and, the nature of the partnership (general or limited); partner's names, positions, contact information and partnership nature. The goal is to be able to ascertain whether or not the Partnership is authorized and able to perform its partner responsibilities.*

☐ *Corporation - If the Private Partner is a corporation, please provide sufficient information to describe the corporation including, but not limited to, its state of incorporation, date of incorporation, by-laws, public/private, stock exchange (if public), officers and their position and contact information. The goal is to ensure that the corporation is authorized and able to provide its partner responsibilities.*

☐ *Other legal entity? Please describe using the above notes as an information guideline:*

b) *Financial Information (Private Partner)*

Please provide a five year history of the most recent audited financial statements for the Private Partner. If its financials are unaudited, provide federal income tax returns.

8. Private Partner's Responsibilities

☐ Enclosed

Please describe the Private Partner's responsibilities. Estimate project scope, cost, feasibility and timeline (schedule). Include any information deemed relevant to understanding the Private Partner's role. Include a copy of any legal agreements governing the relationship between the Applicant and Private Partner.



Application for the Massachusetts District Improvement Financing Program

9. Experience

☐ Enclosed

Please provide a description of related Private Partner experience. Include any information deemed necessary to understanding the Private Partner's ability to successfully perform their role. Disclose any items or issues which would impact the Private Partner's ability to perform.

10. Miscellany

☐ Enclosed

a) Surety information

(1) Current surety provider(s) and coverage(s)

(2) Surety history: Has a bonding company ever been called on to perform on the Private Partner's default? Yes / No. If yes, explain.

b) Has the Private Partner or any of its officers ever declared bankruptcy? Yes / No. If yes, explain.

c) Prior or pending material litigation. Describe any prior or pending litigation against the Private Partner.

d) Tax history: Is the Private Partner current in ALL of its taxes? Yes / No. If no, please explain. For the purpose of this question, contested taxes are considered delinquent.



Application for the Massachusetts District Improvement Financing Program

Sample Contact List

This is a summary sheet identifying participants for use in Sections 2, subsection 2 and Section 3, subsection 6. Please expand as appropriate.

Applicant:

Contact person at the Municipality _____
Title _____
City or Town _____
FAX Number _____
Phone Number _____
E-mail address _____

Counsel: (List General, Bond, Special, Tax and others)

Contact person at the Municipality _____
Title _____
City or Town _____
FAX Number _____
Phone Number _____
E-mail address _____

Assessor:

Contact person at the Municipality _____
Title _____
City or Town _____
FAX Number _____
Phone Number _____
E-mail address _____

District and / or Program Contact(s):

Contact person at the Municipality _____
Title _____
City or Town _____
FAX Number _____
Phone Number _____
E-mail address _____

Preliminary Annual Reporting Form

Reporting Entity: _____
DIF Program: _____

Reporting period: _____
IRDDP: _____

Investment (District and / or IRD):

Public investment current year:

Private investment current year:

Total public investment:

Total private investment:

Assessed value (District and / or IRD):

Base assessed value:

Vacant Land:

Residential:

Commercial:

Industrial:

Personal:

Other:

AV this year:

This year's AV vs base year AV (\$ + / -)

Est. AV at build out:

Taxes (District and / or IRD) and Coverage Calculations:

Base year tax levy:

Incremental DIF taxes:

Annual financial requirement (ADS):

Coverage (X) of ADS by DIF taxes:

Maximum Annual Financing Requirement (MADS):

Coverage (X) of MADS:

Progress Statement: Please describe the status of the DIF Program and the impact of the Program on the District's (and, if appropriate, the Municipality's) economy.

[illegible]

Submitted by: _____, _____ Title, on _____ (date)